MOWINS Hot Topics Session

Calendar/Scheduler Guidance

Missouri WIC

Eat Healthy. Stay Well.

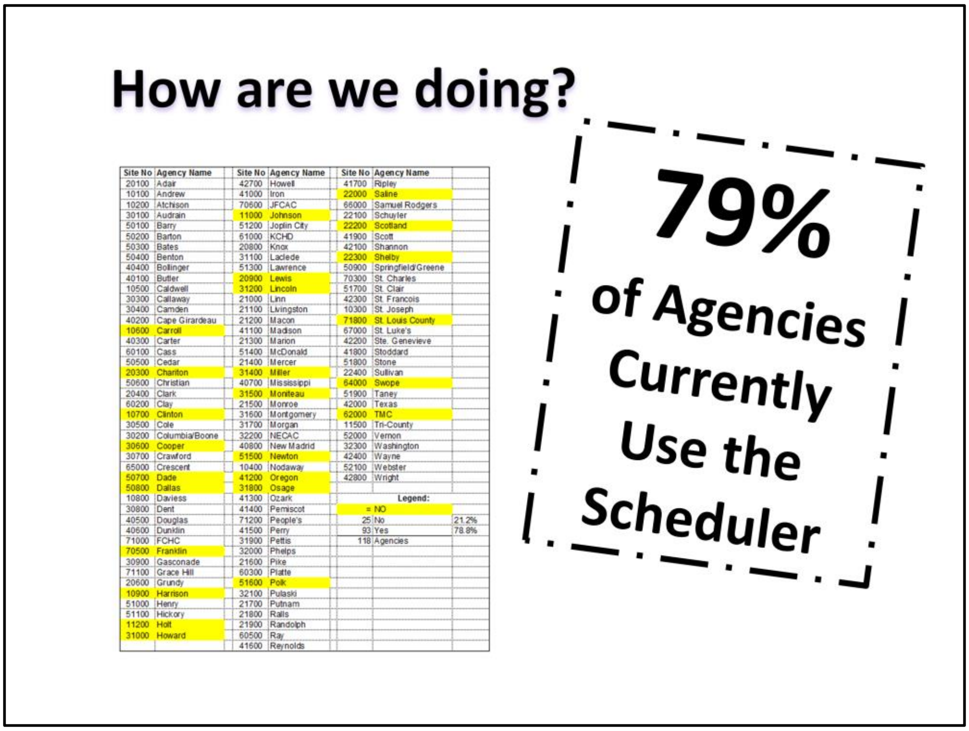
Session Date: March 28, 2014

Welcome to MOWINS Hot Topics! This session we will be providing guidance for building and using the MOWINS Calendar/Scheduler.

Session Agenda

- ***Getting Started***
- ***Tips & Key Points for Building and Using the MOWINS Calendar/Scheduler***
- ***Building Basics***
- ***Getting to Know the Clinic Side of the Scheduler***
- ***Review/Questions***

Here's a quick run down of what we'll be covering throughout the session.



Site No	Agency Name	Site No	Agency Name	Site No	Agency Name	
20100	Adair	42700	Howell	41700	Ripley	
10100	Andrew	41000	Iron	22000	Saline	
10200	Atchison	70600	JFCAC	66000	Samuel Rodgers	
30100	Audrain	11000	Johnson	22100	Schuyler	
50100	Barry	51200	Joplin City	22200	Scotland	
50200	Barton	61000	KCHD	41900	Scott	
50300	Bates	20800	Knox	42100	Shannon	
50400	Benton	31100	Laclede	22300	Shelby	
40400	Bollinger	51300	Lawrence	50900	Springfield/Greene	
40100	Butler	20900	Lewis	70300	St. Charles	
10500	Caldwell	31200	Lincoln	51700	St. Clair	
30300	Callaway	21000	Linn	42300	St. Francois	
30400	Camden	21100	Livingston	10300	St. Joseph	
40200	Cape Girardeau	21200	Macon	71800	St. Louis County	
10600	Carroll	41100	Madison	67000	St. Luke's	
40300	Carter	21300	Marion	42200	Ste. Genevieve	
60100	Cass	51400	McDonald	41800	Stoddard	
50500	Cedar	21400	Mercer	51800	Stone	
20300	Chariton	31400	Miller	22400	Sullivan	
50600	Christian	40700	Mississippi	64000	Swope	
20400	Clark	31500	Moniteau	51900	Taney	
60200	Clay	21500	Monroe	42000	Texas	
10700	Clinton	31600	Montgomery	62000	TMC	
30500	Cole	31700	Morgan	11500	Tri-County	
30200	Columbia/Boone	32200	NECAC	52000	Vernon	
30600	Cooper	40800	New Madrid	32300	Washington	
30700	Crawford	51500	Newton	42400	Wayne	
65000	Crescent	10400	Nodaway	52100	Webster	
50700	Dade	41200	Oregon	42800	Wright	
50800	Dallas	31800	Osage			
10800	Daviess	41300	Ozark		Legend:	
30800	Dent	41400	Pemiscot	=	NO	
40500	Douglas	71200	People's	25	No	21.2%
40600	Dunklin	41500	Perry	93	Yes	78.8%
71000	FCHC	31900	Pettis	118	Agencies	
70500	Franklin	32000	Phelps			
30900	Gasconade	21600	Pike			
71100	Grace Hill	60300	Platte			
20600	Grundy	51600	Polk			
10900	Harrison	32100	Pulaski			
51000	Henry	21700	Putnam			
51100	Hickory	21800	Ralls			
11200	Holt	21900	Randolph			
31000	Howard	60500	Ray			
		41600	Reynolds			

In case any of our Local WIC Providers would like to see our MOWINS Calendar/Scheduler usage level, we are currently looking at approximately 79% of all Clinics using it.

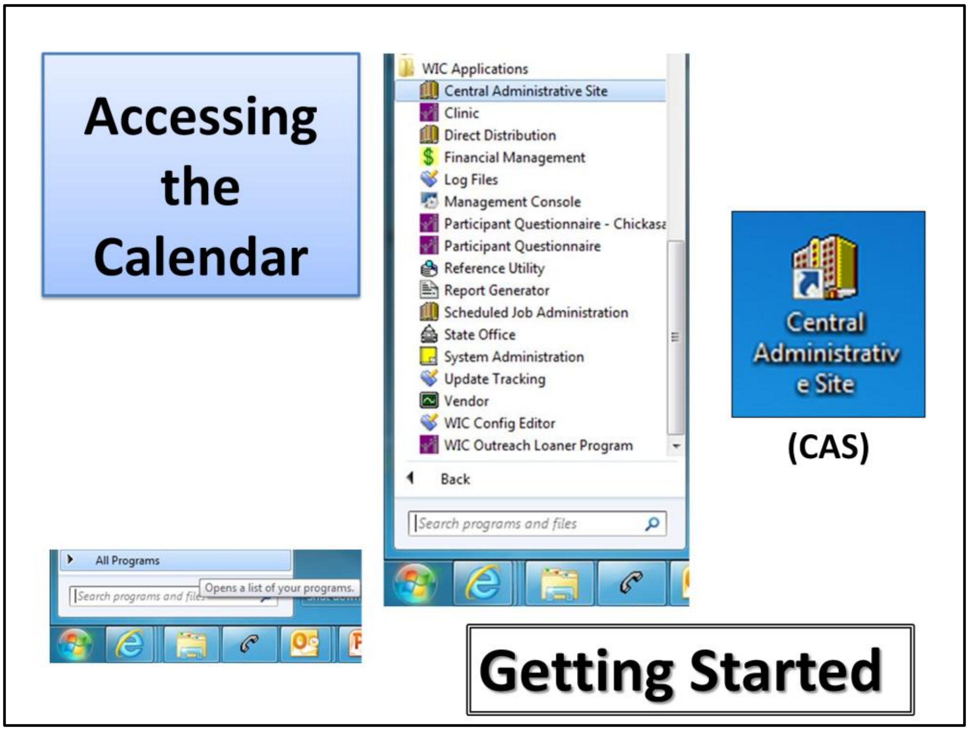
Getting Started

- Designate a Staff Person Responsible for Building & Changing the Calendar/Scheduler
- Designate a Back-up
- Ensure Staff Responsible have Access
  - Agency WIC Coord role
  - Agency CPA role
  - Agency Nutritionist/Nutr Coord role
  - Request Access if Necessary through ASAP

First off, when it comes to getting started with the MOWINS Calendar/Scheduler it's important to designate staff responsible for building and maintaining it. That also means determining a back-up in case staff normally responsible for this are out (especially for extended periods of time) or in case of staff turn over.

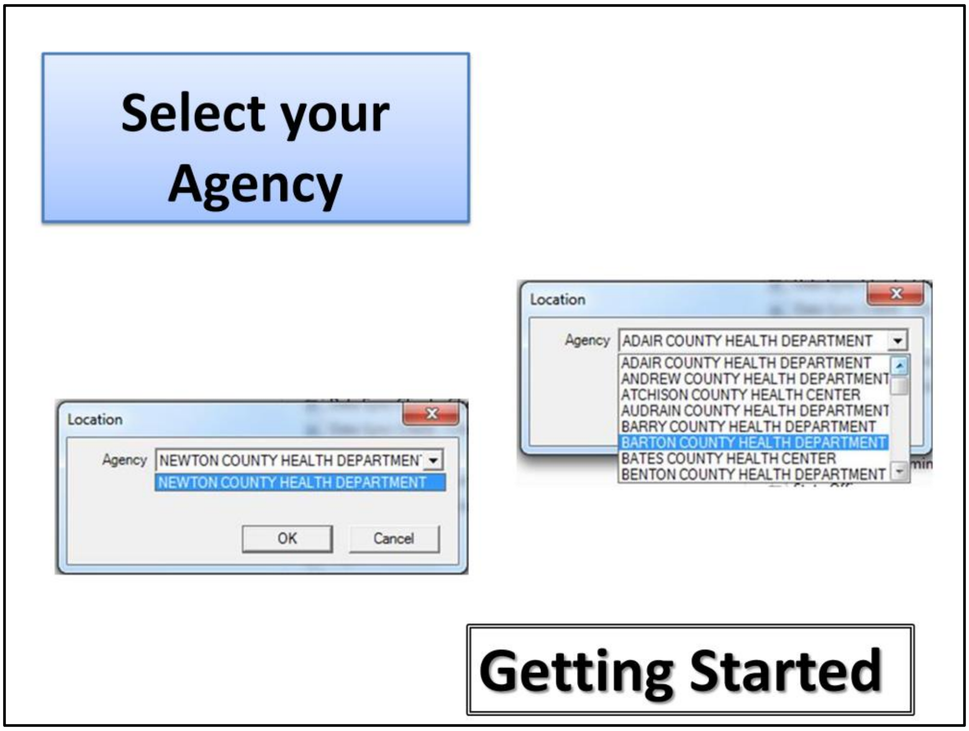
Once staff are selected for this task you must ensure they have appropriate access to build and change the Clinic Calendar. The clinic calendar is built in the Central Administrative Site (CAS).

Staff with either the Agency-WIC Coord role, Agency-CPA role, or Agency-Nutritionist/Nutr Coord role are the only ones with access to the CAS. If someone needs to access an ASAP request should be completed.



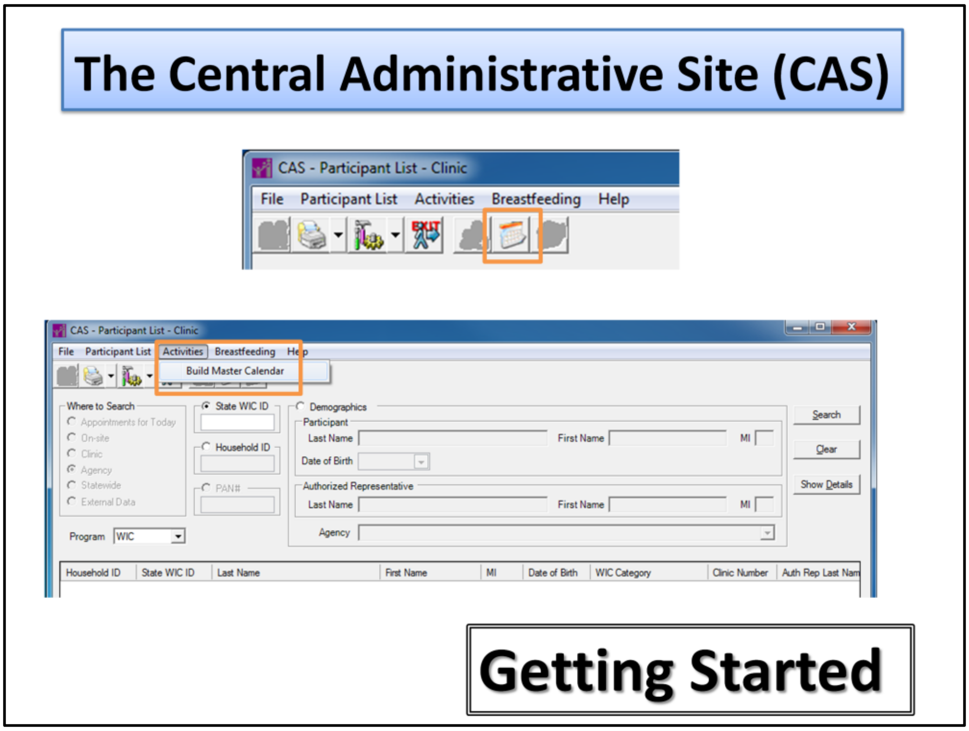
The calendar is built in the Clinic Administrative Site (CAS) of **MOWINS**. It is not built in the Clinic application.

To access the CAS you begin at the Start menu. You will then select All Programs. From there you will find the WIC Applications folder and select Central Administrative Site. Please note that the CAS may also be accessed via a shortcut created on your computer's desktop.



Upon accessing the CAS you will be prompted to select the Location or Agency you will be accessing to build or change the Calendar. If you have access to only one agency it will be the default agency and the only option to select in the Agency drop-down.

If you work for multiple Agencies you will have more than one location to choose from in the Agency drop-down, so be sure you select the Agency that you intend to build or change Calendar information.



When the CAS opens it looks very similar to the MOWINS Clinic, however it contains many differences.

To point out a few differences, first of all at the top of the screen it will say CAS, not Clinic and the Agency Name. Additionally the menus will have different or fewer options and there are fewer shortcut icons. It should be noted that you can use the CAS to search for and view participant records but options are very limited.

To build the Calendar either use the shortcut icon that looks like a calendar or go to the Activities menu and select Build Master Calendar.

Tips & Key Points

- **Plan out Calendar Prior to Building** ***(On Paper!)***
  - Determine Holidays/Planned Closures
  - Determine Days of Clinic
  - Determine Hours of Clinic
  - Determine Resources & Availability
    - **Use Generic Names for Resources** (not Staff Names)
  - Determine Types of Appointments
  - Determine Duration Times for Appointment Types
- **Review Your Caseload & Participant Data**
  - Check WIC Reports/Crystal Reports

The first Tip or Key Point is a big one, Plan your Calendar/Scheduler ON PAPER 1st. The reason we suggest that you plan out the Clinic Calendar ON PAPER prior to building it in MOWINS is because it will save you so much time and stress. You can not have both the CAS and the Clinic open at the same time. For most it's hard to know exactly what you've built in the CAS for a schedule until you close the CAS and go to the Clinic to look at the schedule there. If you don't plan on paper it can create a lot of back and forth between the CAS and the Clinic. Save yourself the time!

Remember when you are planning the Clinic Calendar/Scheduler you really need to think about planned clinic closures, days and hours of business, which staff are available, what kind of appointments you want to offer, and how long appointments should take.

Also, know that it's important to use Generic Titles for your Staff or Resources. This is suggested primarily because of staff turnover and to prevent your clinic from seeing a staff person's name even once they have left your agency's employment. One other item to mention is to not get too detailed and create too many Appointment Types. The more appointment types you have the greater the chances are for confusion among agency staff.

Additionally, you may want to review your participant data before you start building. The reason we suggest this is because you may have to make special arrangements for High Risk participants or to be sure you have enough hours and staff to handle policy related timeframes for participant appointments.

Tips & Key Points

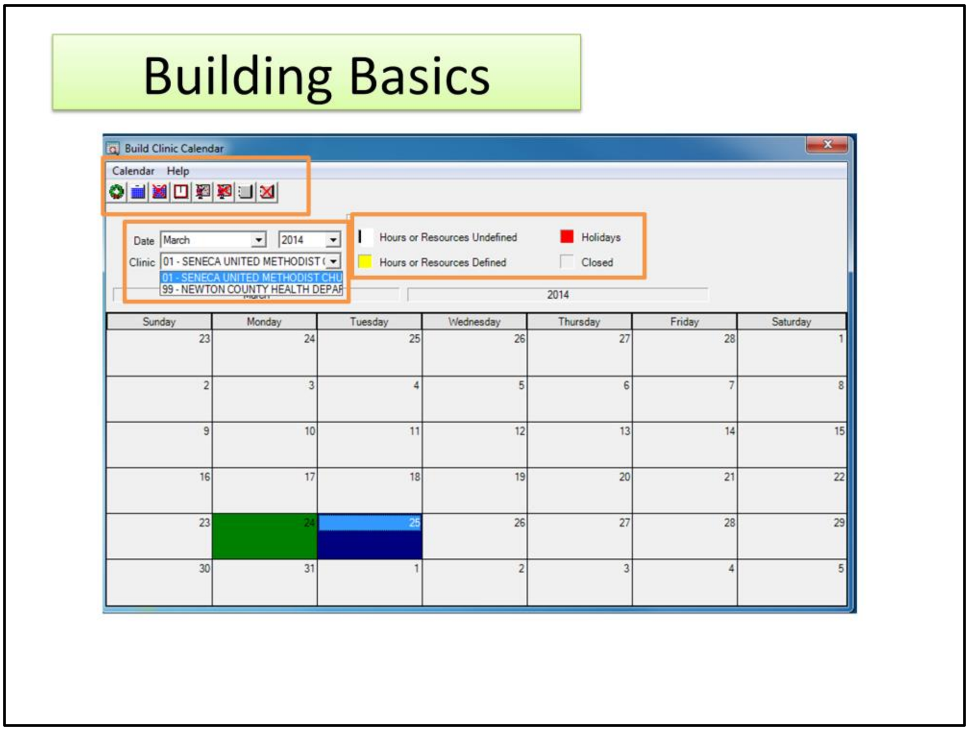
- **Use a Good Starting Point when Building/ Revising Calendar**
  - Start at the beginning of a Month
  - Use a Future Month
- **Don't Build a Calendar too Far in Advance**
  - Try building Quarterly (Suggestion Only)
  - System Limits Calendar Building to 1 Year Out
- **Understand Calendar Building Basics**
- **Get Assistance**
  - Use the Help menu option
  - Contact the WIC Help Desk (or TA Staff)
  - Contact Another LWP

If you are just getting started with the Calendar/Scheduler it's always a good idea to start with a good starting point. That may mean starting with a future month or at the beginning of a month so that you are working with a full month. (If we are already halfway through March, focus on building a schedule for April).

Additionally, if you are planning to really Revise your clinic scheduler it is better to start the revamp on a future month so that you won't create problems for the current month or months in which participants are already scheduled.

Another suggestion is to not Build the Calendar out too far in advance. The system does limit you to building out only as far as 1 year out, however it may be a good idea to only build out the scheduler quarterly so you don't have to do double work by building and then revising or rebuilding if your agency would undergo major changes that could affect your schedule.

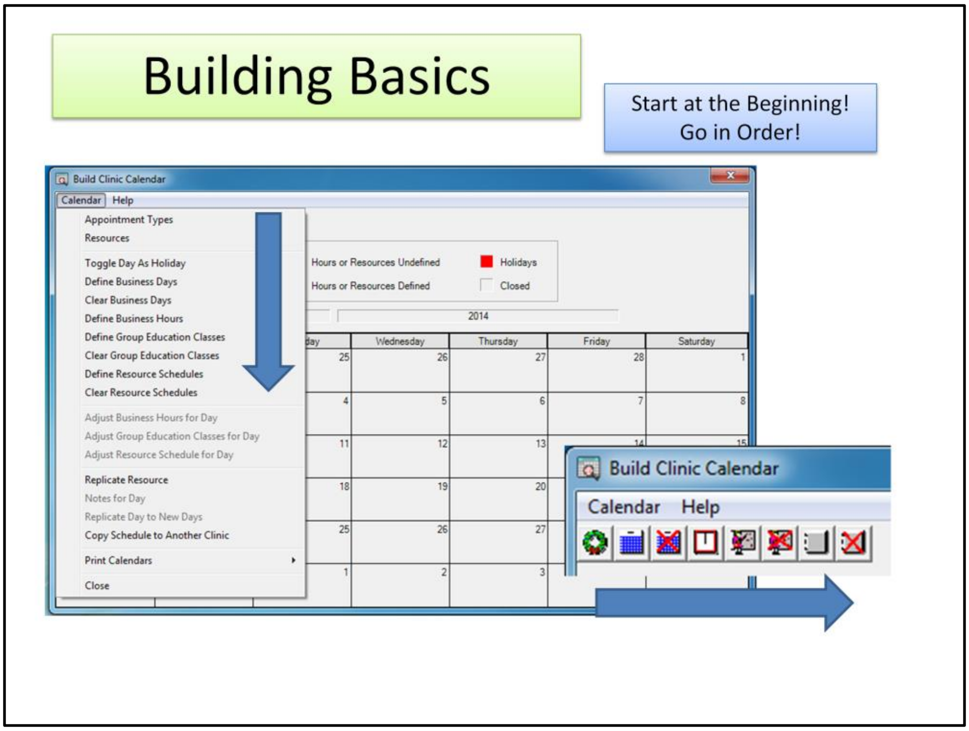
Also, if you are just learning about the Calendar/Scheduler you may want to just pick a future month to "play" if necessary to build your knowledge of the build options. Still, remember that if you have questions there are several resources available that can provide answers. Utilize the Help menu option, your District TA Staff, the Help Desk, or even another LWP that has knowledge of the scheduler if necessary.



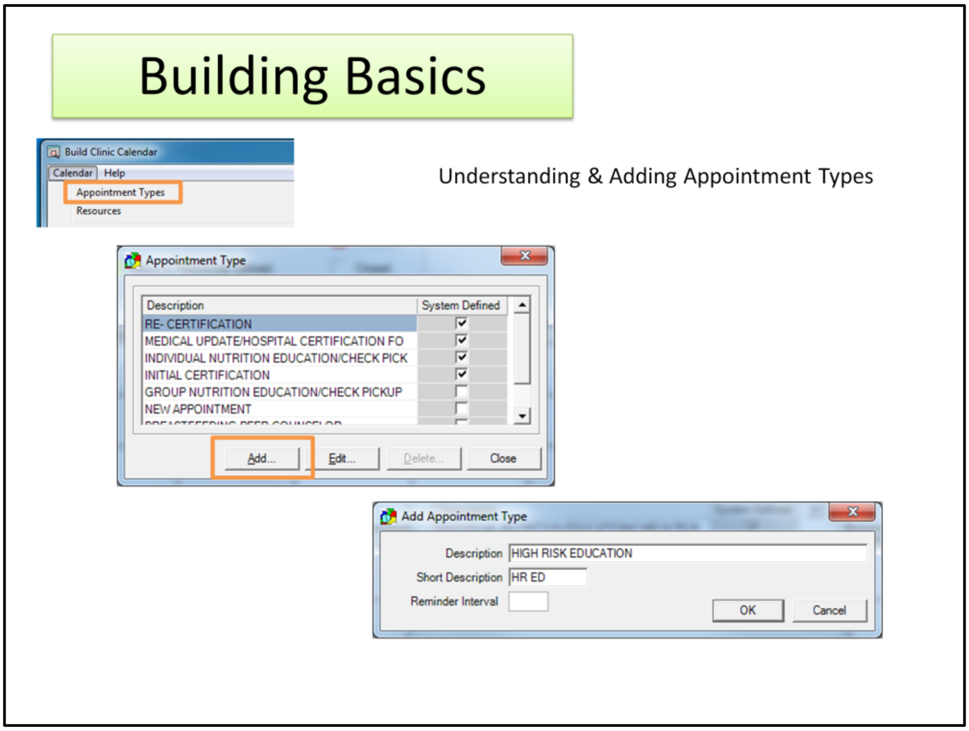
Once Build Master Calendar is selected, the Build Clinic Calendar screen opens. Understand that there are menu options & shortcut icons available to build the clinic calendar. When you hover over the shortcut icons a tool tip will display to help users identify each icon's function.

Another item key to building the Clinic Scheduler is the Date & Clinic information displayed on the Build Clinic Calendar screen. The month, year, and Clinic information are displayed in the top left drop down fields. If the agency has satellite offices those will also be listed in the Clinic drop-down. Be sure to select the appropriate Date & Clinic location when building or changing clinic calendar(s)!

The next area we want to look at is the color **grid**. The color grid will assess the progress that you have made in developing the calendar. The calendar in the current phase is gray in color. The **gray** indicates that the clinic is "closed" or that the calendar is incomplete. When you begin to work on the calendar, you will notice the color changes on the grid. The days that you mark as **holidays** are symbolized with the color red. The days will change from gray to **white** when the business days and the hours are added to the clinic calendar. **Yellow** signifies the last color change on the grid and designates that both the hours and the resources are defined. A day that has been selected is **blue** and the current calendar date will show in **green** (when not selected).



One of the BEST tips we can give is to Go in Order when building your Clinic calendar! That means working your way down the Calendar menu or working your way from left to right using the shortcut icons. Both the Calendar menu and shortcut icons are essentially in the appropriate order for optimal use.



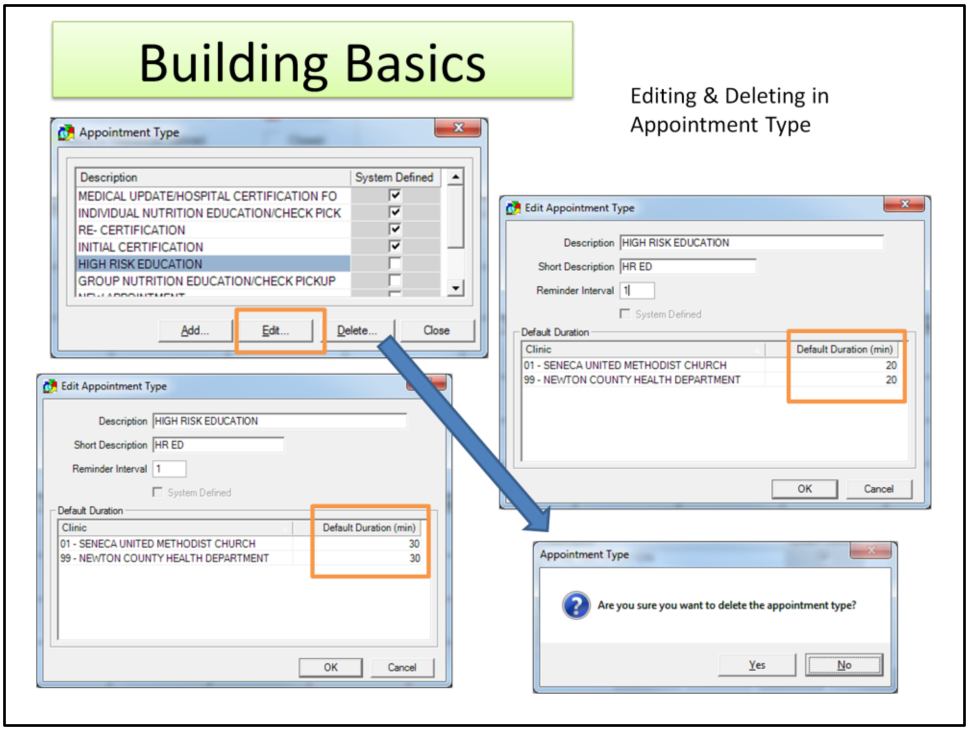
First items to build in the calendar are Appointment Types and Resources which are only accessible through the Calendar menu. Another tip is to Know the difference between Appointment Types & Resources. Appointment Types are what the participant is actually coming to the Agency for while the Resources were set up to be designated as actual staff available. **NOTE!** Both Appointment Types & Resources are for use at both the Clinic & all Satellite locations. You can't create separate Appointment Type & Resource lists for each location.

Let's talk about Appointment Types first. Take time to think about what your participants are coming in for, especially if there is something specific you don't want participants to leave without doing. It is a recommendation however, that you DON'T get carried away and create too many Appointment Types to choose from. The more choices the greater the chances are for confusion.

When opening the Appointment Types the screen displays with some appointment types already created. Some of the appointment types have the box checked as system defined. These system defined appointments cannot be deleted, they may only be edited. (Currently only the Reminder Interval & the appointment Duration can be changed in the Edit screen). Keep this in mind when you are determining what kind of appointments you will need for your clinic.

The appointment types that are available are listed in the description field. If you wish to Add a different appointment type than the ones shown, you would click the **Add** button. On the Add Appointment Type screen, type in the description (aka title), an abbreviated description, & the reminder interval that you want for the new appointment type then click OK.

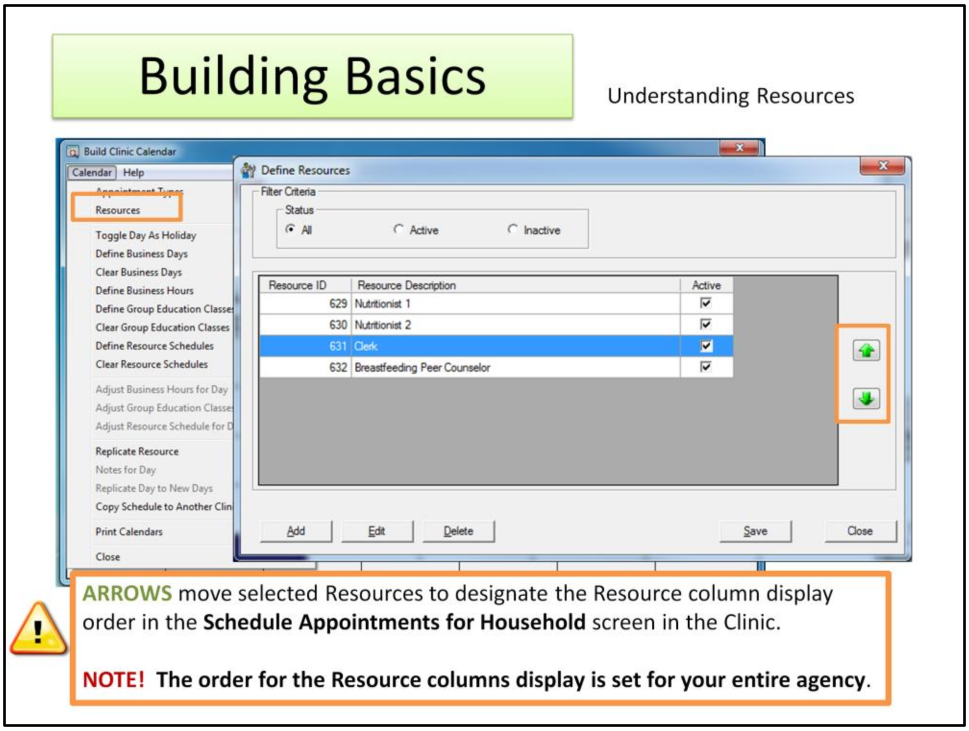
SUGGESTION! Use Consistency when using the Add/Edit features as these will allow Descriptions to be entered in lower case, upper case, etc. (If want all Appt Types to appear in Caps then you must Add them in Caps). Also, if you are unsure what the **Reminder Interval** is, it is supposed to be used to indicate the number of days prior to an appointment that appointment reminder e-mails will be sent to clients. It accepts the entry of numeric characters. While the field is required to Add an Appointment Type it is not currently utilized in MOWINS.



We also have the options to Edit & Delete Appointment Types. Please be aware that these two options may have limitations. These limitations are due mainly to the fact that MOWINS holds historical data.

Once an Appointment Type is selected you can click the Edit button. System Defined Appointment Types can only have Reminder Interval & Duration values changed while in the Edit mode. If the Appointment Type is not System Defined user's can change the Description, Short Description, and even the Duration by clicking on the minute value in the Default Duration (min) column & then typing the value desired.

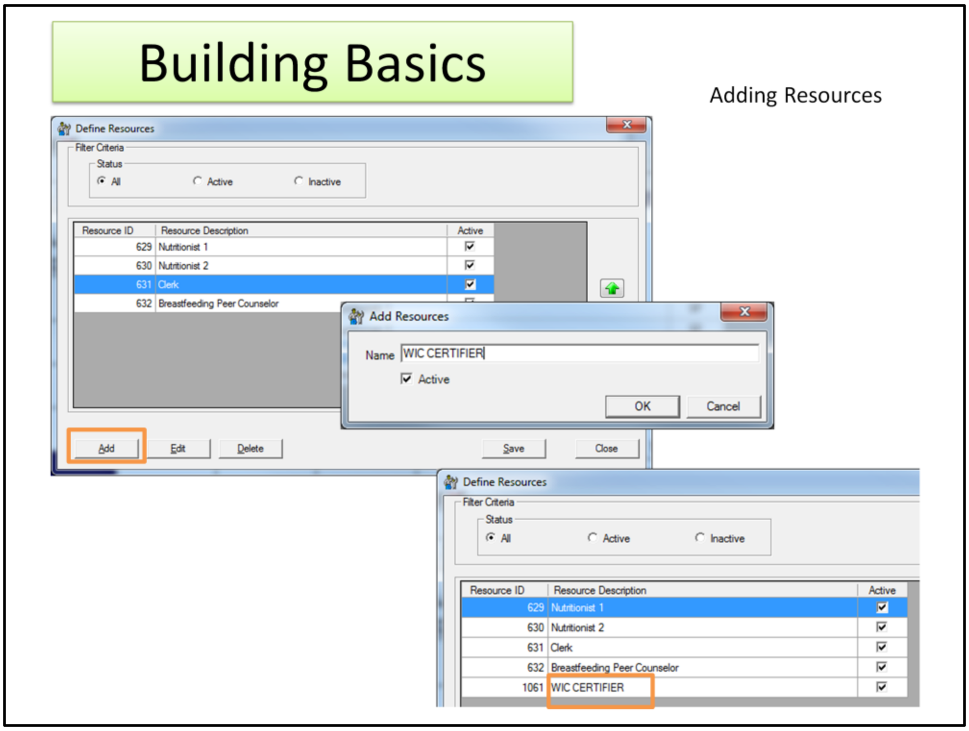
When it comes to the Delete option, users can't delete System Defined Appointment Types. Other Appointment Types depending upon if they have actually been used in the MOWINS Clinic Scheduler can be deleted. You can attempt to delete any Appointment Type not system defined and when doing so you will receive a message asking to confirm this selection.



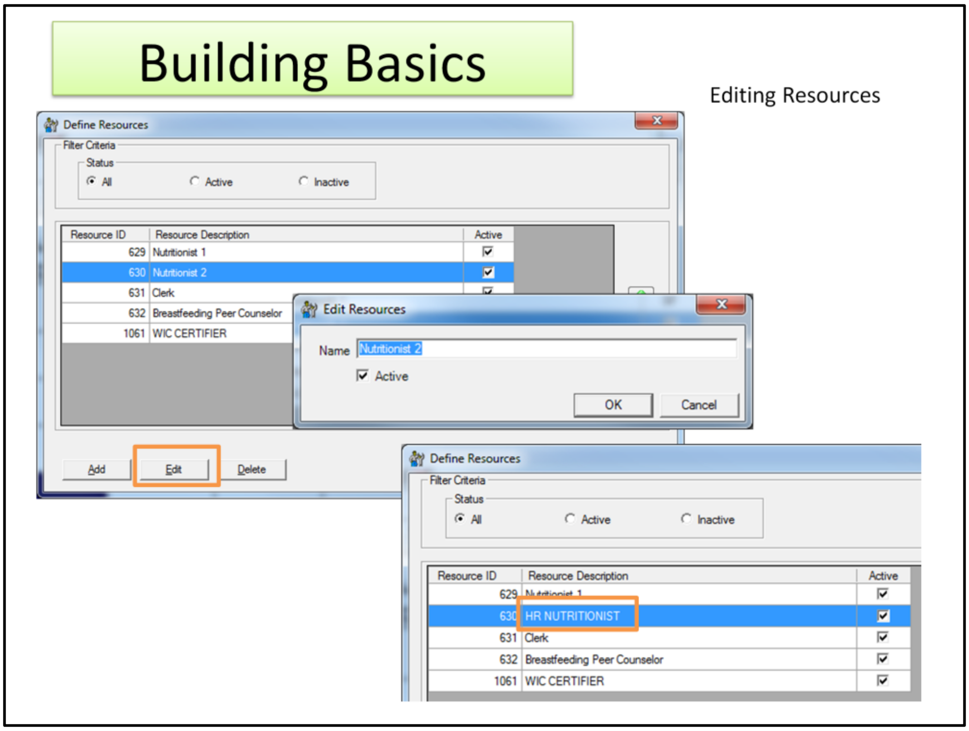
On to the Resources! **Resources are Staff** (or possibly Office Spaces available to serve participants). Don't create a bunch of Resources that are actually Appointment Types, please stick to your staff when you are working with Resources. Also, Remember to stick to those **Generic Titles** and **BE CONSISTENT** when creating/editing your Resource Description.

The data grid will show any resources that have been defined. The order in which the Resource appears in the data grid will be the way that they appear in the Clinic Scheduler. Previously Resources would show in the Clinic scheduler and then rotate based on the earliest appointment for the day. In a recent release the **arrows at the right** were added to allow agencies to choose the order in which the Resources appear in the Clinic Scheduler and to prevent Resources from constantly "Rotating". Use the Arrows to move selected Resources up and down in the list to set the order preferred to display Resources in the Clinic's Schedule Appointments for Household screen. (The Resource in the top slot on the Define Resources screen will be in the very first column (at the left) in the Clinic Scheduler).

NOTE! The order set in the Define Resources screen is set for your entire agency. It cannot be set to display in a different order for different clinics within your agency. However, if a Resource does not have hours defined then they will not show in the Clinic Scheduler. Basically, the list of Resources shown in the Define screen will be the same list at each clinic if the Resource is being utilized in the site's schedule.

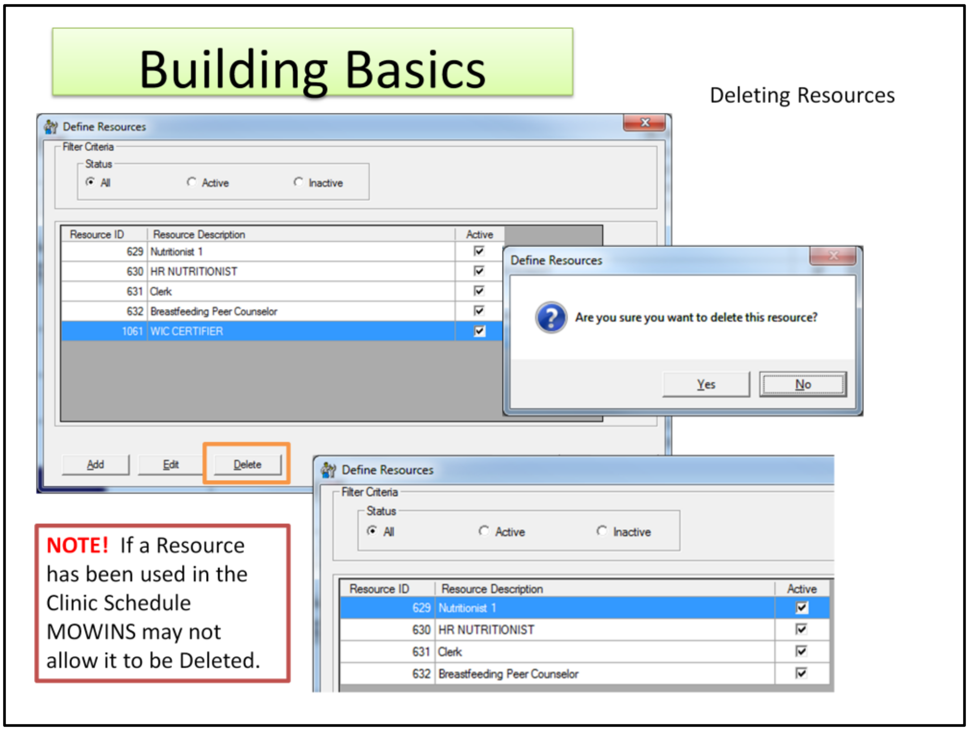


Let's work on Adding a Resource! In the Define Resources screen, if you wish to add a Resource click the **Add** button. The Add Resources screen opens and user's can enter the Resource's Name and check mark the Active box to make it active once the OK button is selected. **Remember!** When creating New Resources, use Generic Titles not Staff Names and be consistent in terms of what type of letter case you want the Resource to appear as.



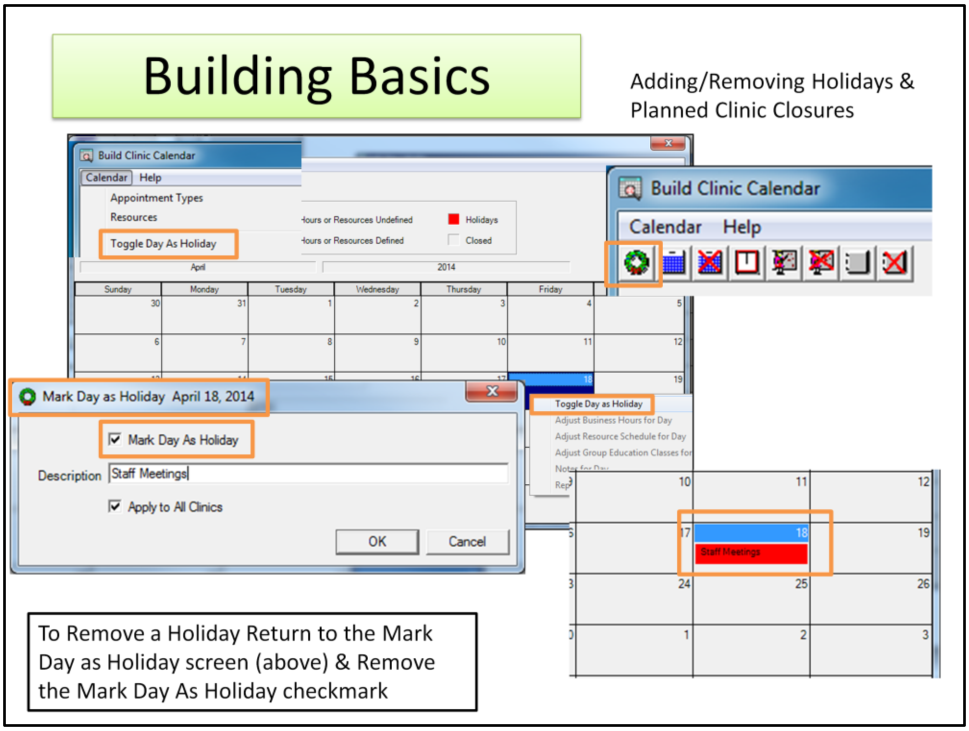
To Edit a resource, highlight the Resource you wish to edit. Select the **Edit** Button. The Edit Resources screen will open and allow changes to be made if possible. Once the changes are complete, click OK. You will then see the updated resource.

Resources can be Edited & Deleted depending upon if they currently have appointments scheduled and/or if they have been used in the MOWINS Clinic Scheduler.



To delete a resource, highlight the Resource you wish to delete, remembering System Defined resources cannot be deleted. Select the **Delete** Button. The next screen asks, “Are you sure you want to delete this resource?” Select the appropriate response; yes to remove, no to return to the Define Resources screen. Selecting “Yes”, will display the updated resource listing.

Resources can only be Edited and/or Deleted depending upon if they currently have appointments scheduled and/or if they have been used in the MOWINS Clinic Scheduler. Be aware that Deleting may NOT be possible because again, MOWINS holds historical data. (If you have just created a Resource and decide to Delete it immediately you will be able to do so as shown).



The first step in completing the calendar is to make note of the Holidays OR planned office closures. Only the current or future days may be defined as holidays. "**Holidays**" if set prior to building business days & hours will override any you attempt to set.

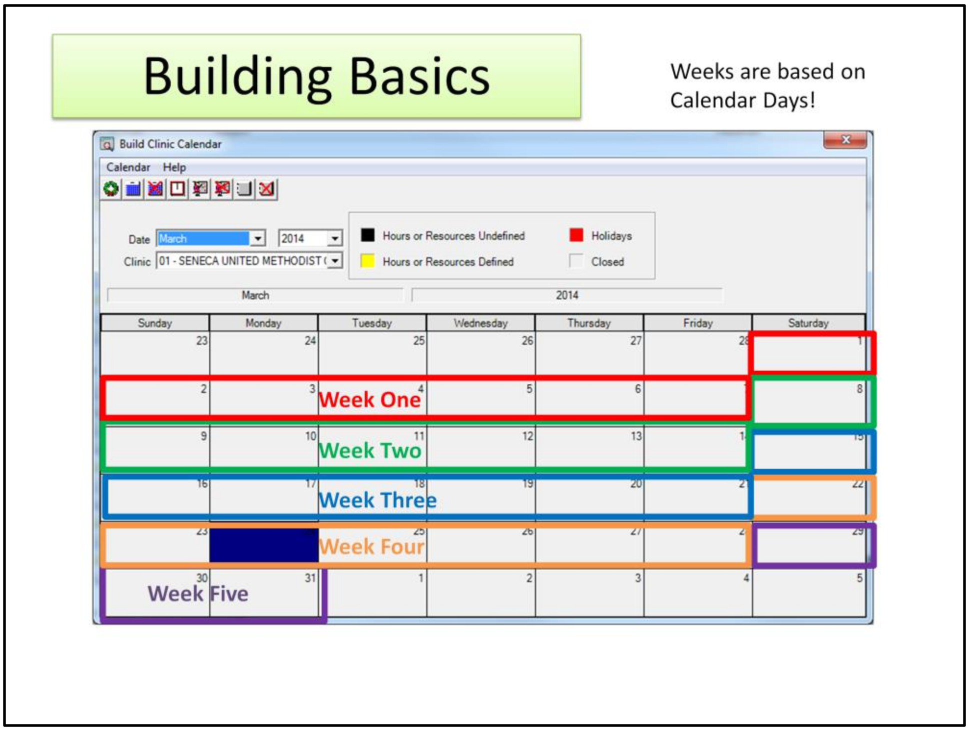
To mark a day as a holiday on the calendar, you will check the month and date, verify that the clinic is appropriate, and put your cursor on the day that you wish to mark as a holiday. When you put your cursor on the day that you want to mark as a holiday, you will click once to highlight.

In this case, on April 18th this clinic will be closed. After selecting the date, there are 3 options for the next step in marking the day as a holiday. You may use the shortcut icon that has a wreath, the Calendar menu selecting Toggle Days as Holiday, or you may right-click on the date to open a menu to select Toggle Day as Holiday.

Choose your method and the Mark Day as Holiday screen will open. Please note that one way to verify that the correct date has been selected to be set as a holiday is to notice that the date will appear in the title of the Mark Day as Holiday screen. If the date is correct proceed. To ensure the day is set as a "holiday" make sure that the Mark Day as Holiday checkbox is marked. Then type in the name of the holiday/closure that you want displayed on the calendar, and mark the Apply to All Clinics" accordingly. When finished click the OK button. Notice that the date selected is now marked as a holiday as signified by the red.

Remember not all of your agency's clinic locations may be closed for the same holidays/closures so be mindful of this when utilizing the Apply to All Clinics checkbox.

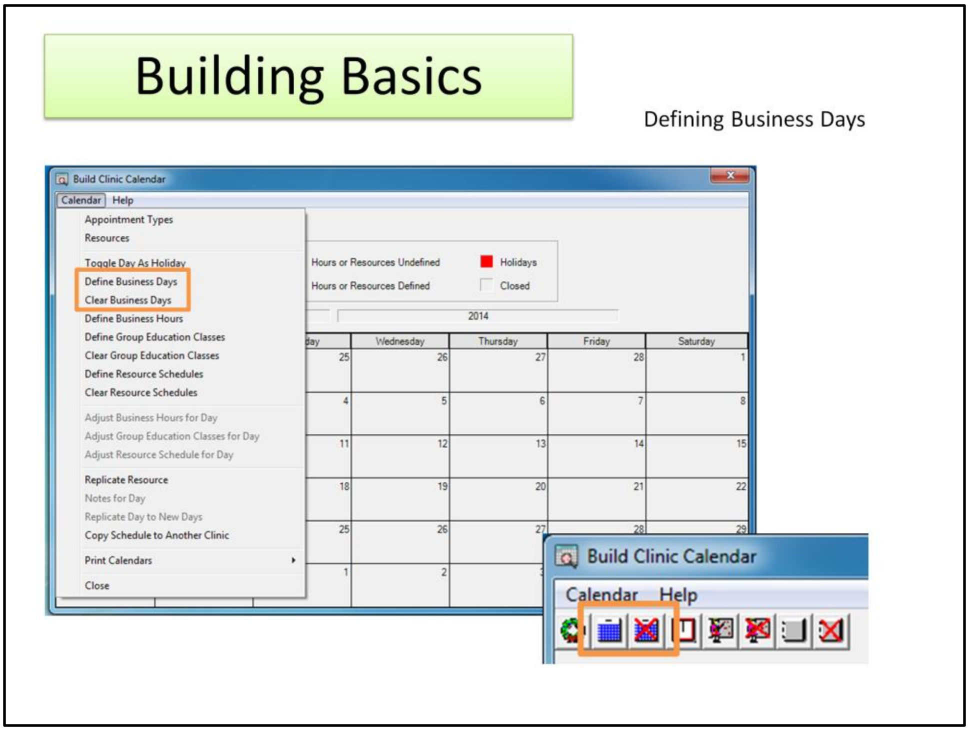
If you have accidentally marked a day as a holiday, you may correct it by highlighting the day, going to the toggle day as a holiday option and then remove the checkmark next to Mark Day As Holiday and click OK. The date is then no longer red, meaning its no longer considered a Holiday.



The next step in the calendar build process is to understand the business days. When you are working with defining the business days, defining business hours or defining resource schedules you will need to know how the system identifies the weeks of the month. The **system looks at the calendar days** of the month, not necessarily what we think of as a regular work week.

The system defines the weeks as follows:
Week 1 constitutes calendar days 1-7.
Week 2 constitutes calendar days 8-14.
Week 3 constitutes calendar days 15-21.
Week 4 constitutes calendar days 22-28.
Week 5 constitutes calendar days 29-31.

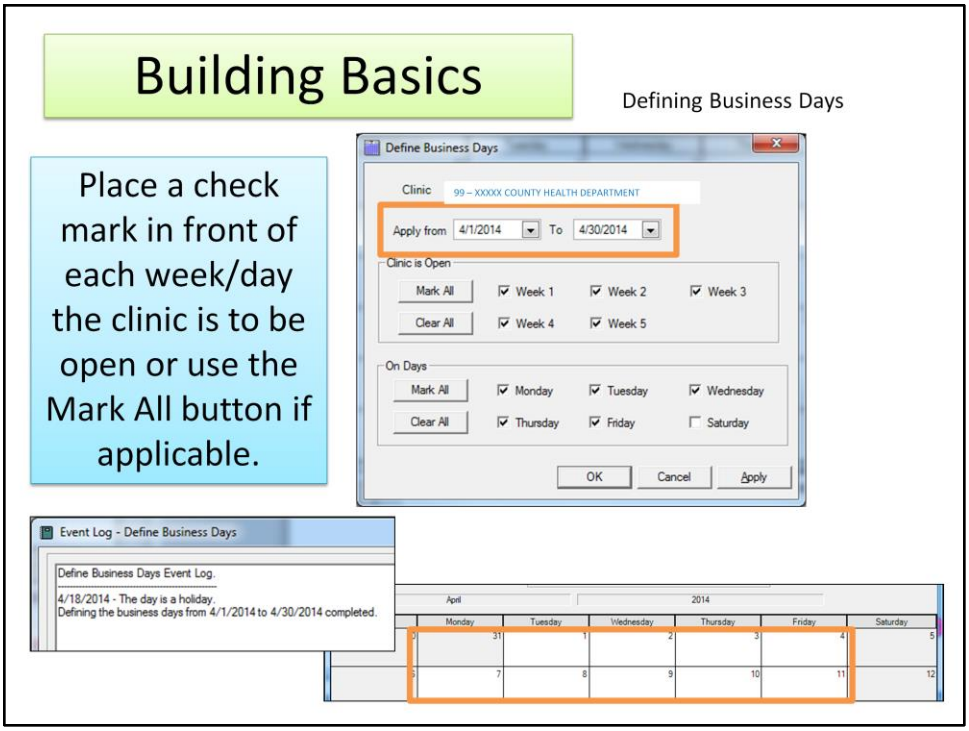
So, if the first day of the month falls on a Saturday like the example, the system considers the first week as Saturday through Friday. Understanding this will help you as you define the business days, business hours, and resource schedules.



Next up, Business Days!

When defining or clearing business days, you can go to the Calendar Menu **or** find the short cut icons. The Define Business Day icon appears as a Calendar and the Clear Business Days appears as a Calendar with a Red X.

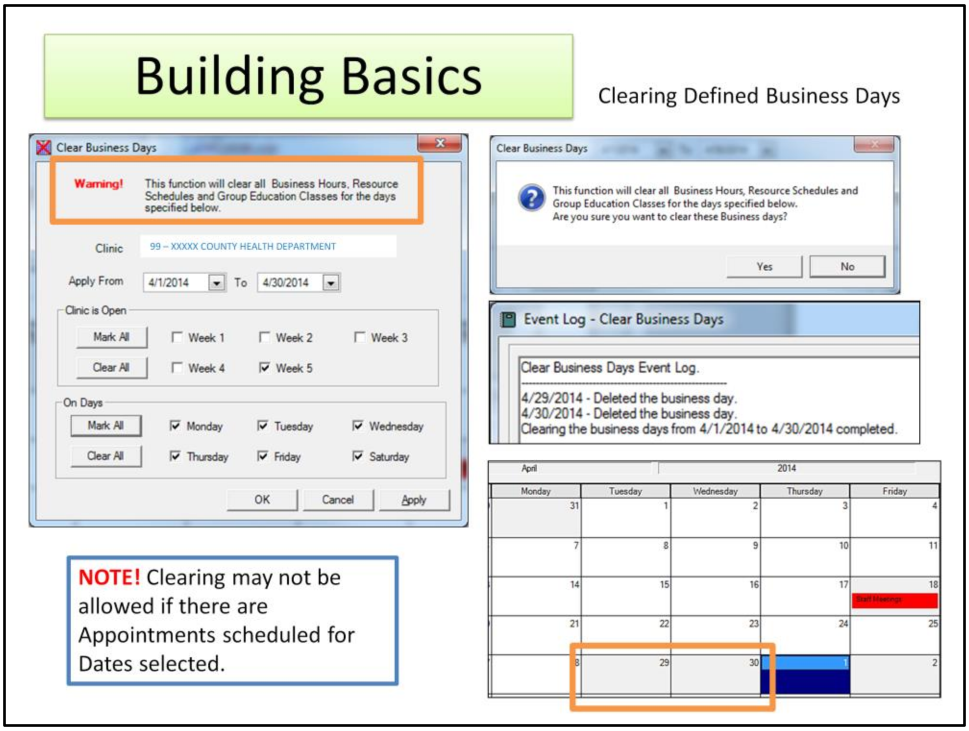
Building Tip! It’s easier to build a Clinic’s Business Days and Hours with extra options because if you want to open up dates later on all you would need to do then is set hours for Resources you’d like available on that date/time.



When you go into Define Business Days the first item you will notice is that the screen shows the Clinic name to verify you are working in the correct clinic. You must then select the Apply From and To dates by either typing in specific dates or using the drop down arrows and using the calendar. Then place a check mark in front of each week/day the clinic is to be open or use the Mark All button if applicable.

When you click “OK” or “Apply” you should receive an event log. This log provides information regarding what you entered in the Define Business Days screen. Once you have read the information, you may click on the screen’s close button. When clicking Close it will take you back to the Define Business Days screen if you used the Apply or to the Build Clinic Calendar screen if you used the OK.

Notice the calendar has changed colors from gray to white once Business Days have been defined. Dates appearing in White are now considered Business Days. The white also indicates that the clinic is not closed, but that the hours or resources are not yet defined for the dates now defined as Clinic Business Days .



If you must clear the business days, the Clear Business Days screen is the place to do it. But BE CAUTIOUS! Remember, the red X on the icon is there for a reason.

When the Clear Business Days screen opens the top portion now has a warning that reminds you of the function of this screen before you proceed.

Again it shows the Clinic name to verify you are working in the correct clinic. You must then select the Apply from and to dates and place check marks in front of each week/day that you need to now **Clear** as a Business Day.

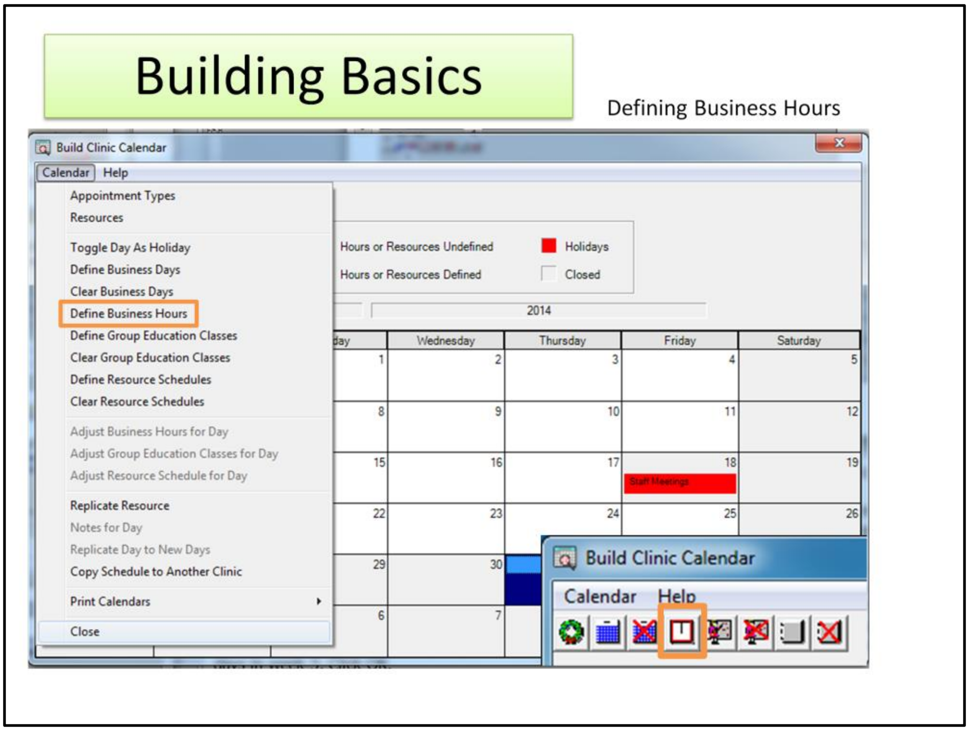
In this case we are going to clear the business days for all days in week 5. Once my information is entered I click Apply. A "second" warning screen appears asking to confirm that you want to proceed. In this scenario, I clicked Yes. Another event log will appear with the days/weeks that will be affected by clearing the selected business days. Clicking close will take you back to the Clear Business Days screen that will now appear "blank". If no further updates are needed, click Cancel to close the Clear Business Days screen.

(If I had only wanted to make one change I could have clicked the OK option instead of the Apply and the same functions would have occurred however after the event log I would have been returned to the Build Clinic Calendar screen instead of the Clear Business Days screen).

When we return to the Build Clinic Calendar screen we can now see that Business Days selected to be cleared are no longer showing in White and are now Gray in appearance meaning they are no longer Clinic Business Days.

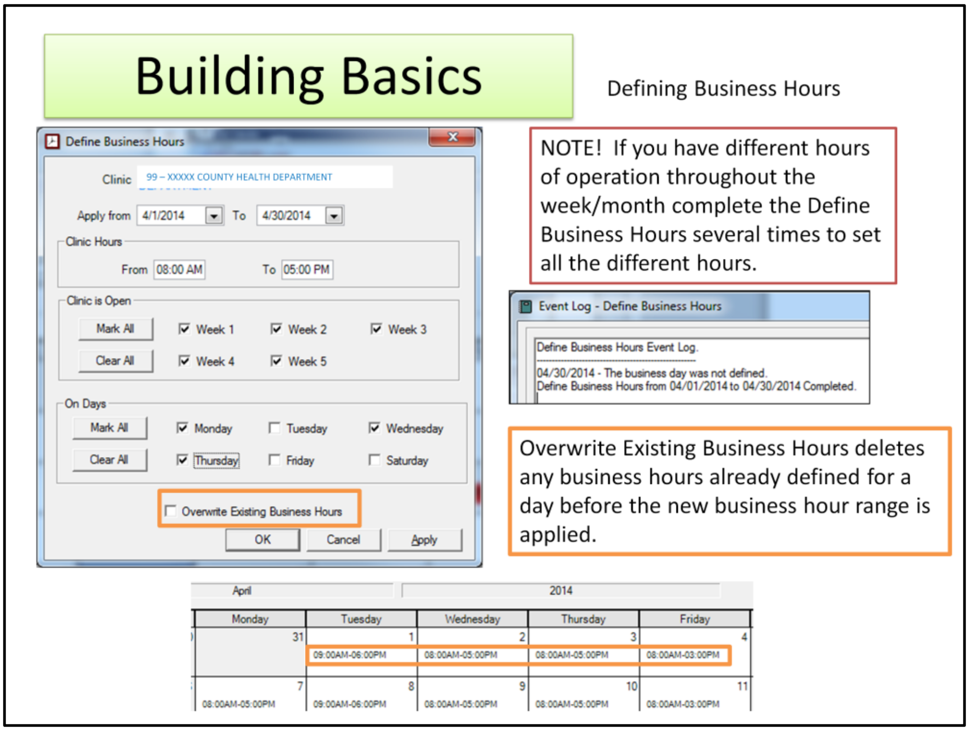
NOTE! Clearing may not be allowed if there are Appointments scheduled for Dates selected.

Tip! In the Apply From and To fields if it were desired you could select the dates to be for only 1 day and not matter what was selected in the Weeks/Days screen the change will only be applied to the 1 day.



We are now ready to Define Business Hours. When defining business hours, you can go to the Calendar Menu or find the shortcut icon.

Note! The **Business Hours** are any hours for which the **CLINIC** may be open, **NOT staff hours**. Setting staff hours will be further explained later in the Define Resource Schedules.



The Define Business Hours screen again first shows the Clinic name to verify you are working in the correct clinic. You must then select the Apply From and To dates. You will then add Clinic Hours. **NOTE!** Be sure to enter AM & PM information, it's required by the system and you can't proceed without it.

To ensure that our clinic calendar can easily be adjusted later we are setting the Clinic Hours to be from when the clinic opens in the morning up to the time the clinic will close, and will NOT set our hours to be closed for lunch. **Later we will use our Define Resource Schedules to allow for a clinic lunch hour "closure".**

Then place a check mark in front of each week/day the clinic is to be open for the dates and times entered. Again, you can use the Mark All button options if applicable.

When you click OK or Apply you should receive an Event Log. This log provides information regarding what you entered in the Define Business Hours screen. Once you have read the information, you may close the screen. When clicking Close it will take you back to the Define Business Hours screen that will now appear partially "blank" (week & day information will be unchecked).

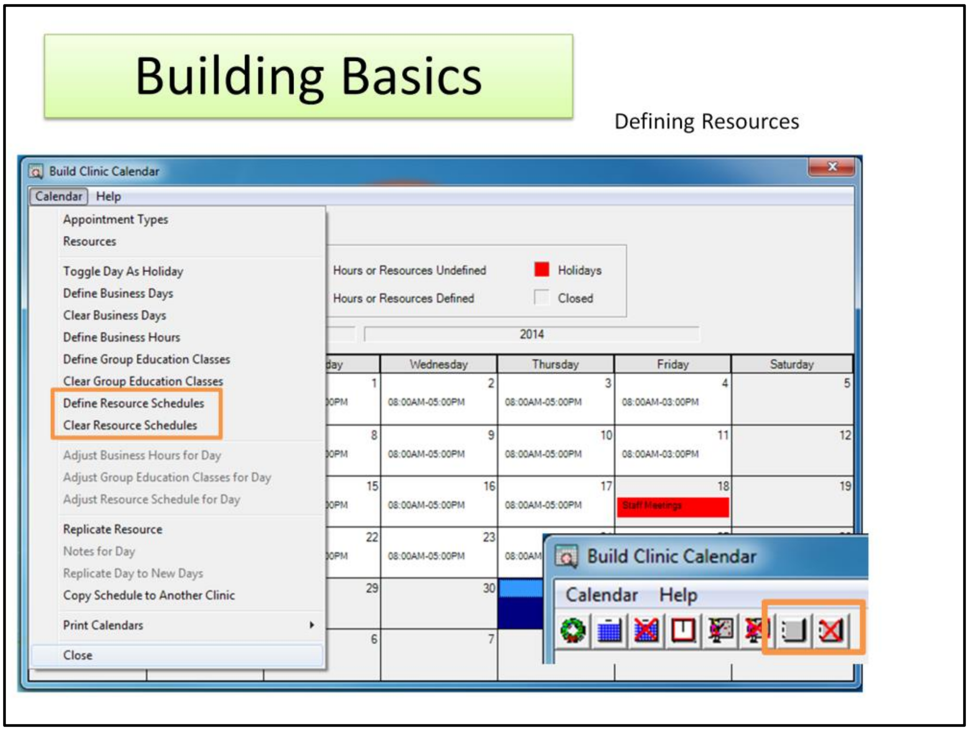
NOTE! If you have different hours of operation throughout the week/month complete the Define Business Hours several times to set all the different business hours.

FYI- Select the Overwrite Existing Business Hours check box to indicate that any business hours already defined for a day that is included in the selected days should be first deleted before the new business hour range is applied.

Once no further updates are needed, click Cancel to close the Define Business Days screen.

When we return to the Build Clinic Calendar screen we can now see that Business Days & Business Hours & easily see that the Business Hours were defined because time frames are now shown for dates defined as business days on the calendar.

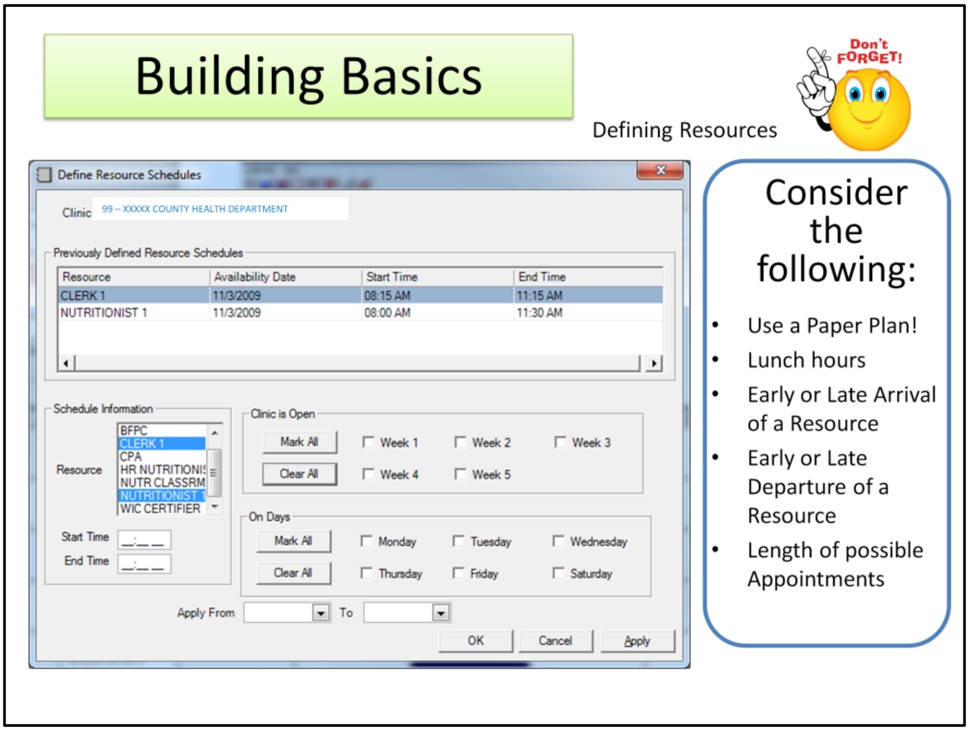
Also you may notice that the time frames vary. This is because I used the Apply several times in Define Business Hours with different time and date information.



The next step in creating the calendar is to define or schedule our **Resources**. You may choose to define the resource schedules by going to the Calendar menu and selecting Define Resource Schedules or by clicking on the shortcut icon (the agenda/planner).

Also, sometimes it is necessary to Clear a Resource on the schedule if staff are away from the office or if a Resource was incorrectly added to the schedule. When clearing resource schedules again, you can go to the Calendar Menu or use the shortcut icon. In the Calendar Menu, choose Clear Resource Schedules or use the shortcut icon that has a planner with the red X through it.

NOTE! Prior to removing a Resource from the schedule you should check to ensure that the resource has no appointments scheduled for the time frame you are needing to clear. If there are appointments scheduled, they must be rescheduled BEFORE removing/clearing the resource.

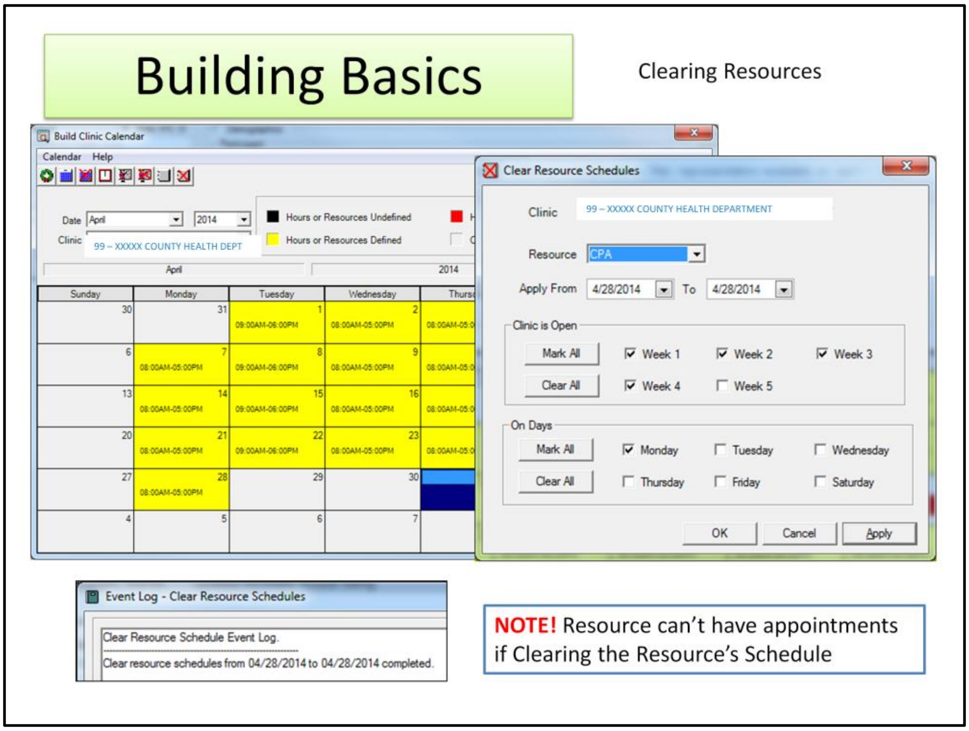


The Define Resource Schedules screen displays to begin the process of scheduling the resources or staff. At the top of the screen first notice Clinic name. Again use this to verify you are working in the correct clinic. If you have previously defined schedules in place, the schedules will appear in the top of the screen in the Previously Defined Resource Schedules grid.

To start this process click on the resource that you want to define first. When the resource is highlighted, the resource changes to blue. After the resource is highlighted, you will enter the weeks & days the resource will be available for appointments, the start and end time as the time frame to apply the schedule, and dates for the Apply From and To. **Remember that any resources that have lunch hours will require two entries; one before lunch and one after**. You will complete this process for *each* of the resources or staff that you wish to schedule participants to see. Use OK to finish and Apply to enter additional resource schedules.

Note! If Resources are scheduled for the same dates and times of the day, you can click on multiple resources and define the schedule for all at one time.

Again, when trying to set up the Calendar/Scheduler for the clinic it is helpful to have already planned it out on paper first. Having the schedule planned on paper will save time during the building process. Still, Take your Time building this!



Once a date has at least one Resource Defined the date will appear in **Yellow** on the Build Clinic Calendar screen.

To clear a Resource's schedule open the Clear Resource Schedules screen. When the screen displays again at the top of the screen we see the

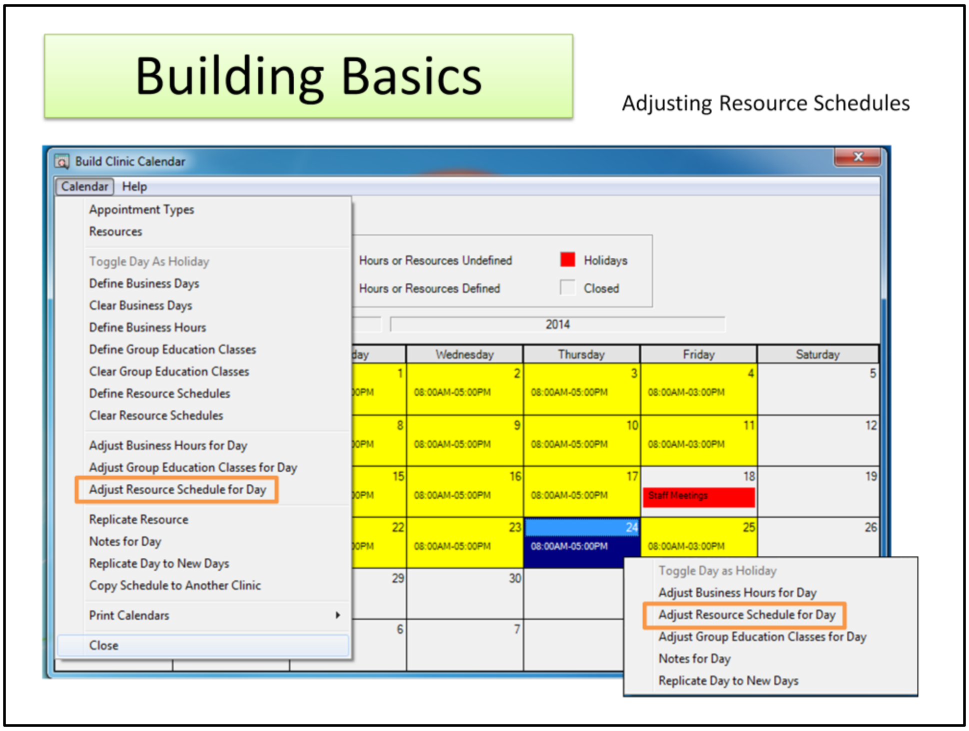
Clinic name which should be used to verify that you are working in the correct clinic.

To begin the process of clearing the Resource or staff schedules for the clinic select the Resource you wish to clear in the drop down field.

Enter the date range you wish to apply, mark the week(s) of the month to clear, then mark the days for which to clear. Click on the OK to finish

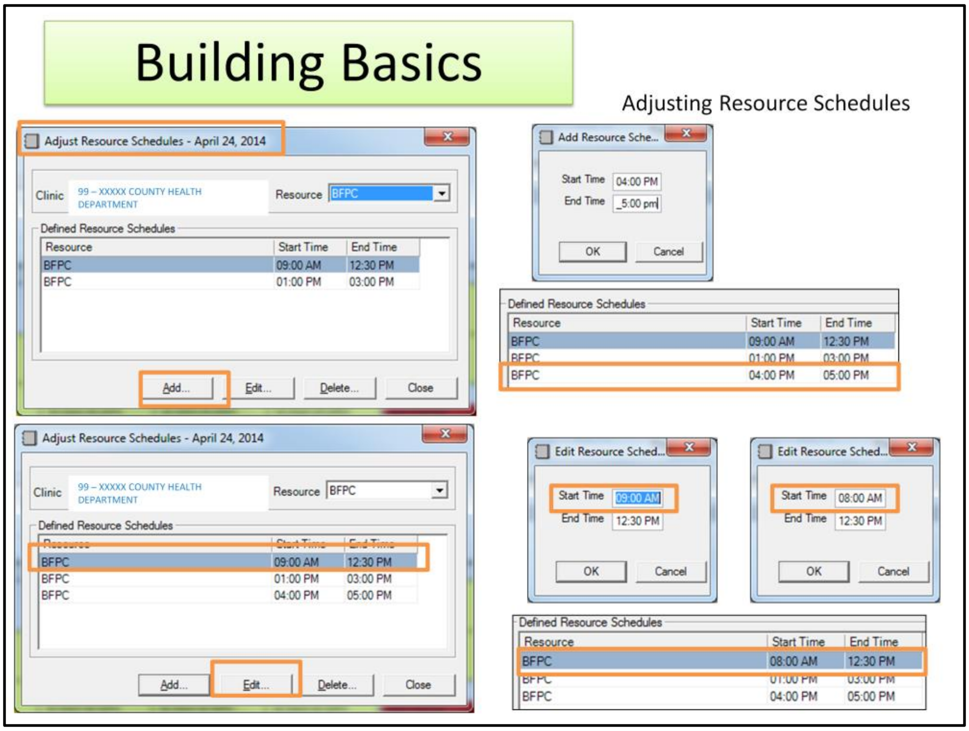
or Apply to clear other selected Resource schedule(s).

NOTE! Resource can't have appointments if Clearing the Resource's Schedule.



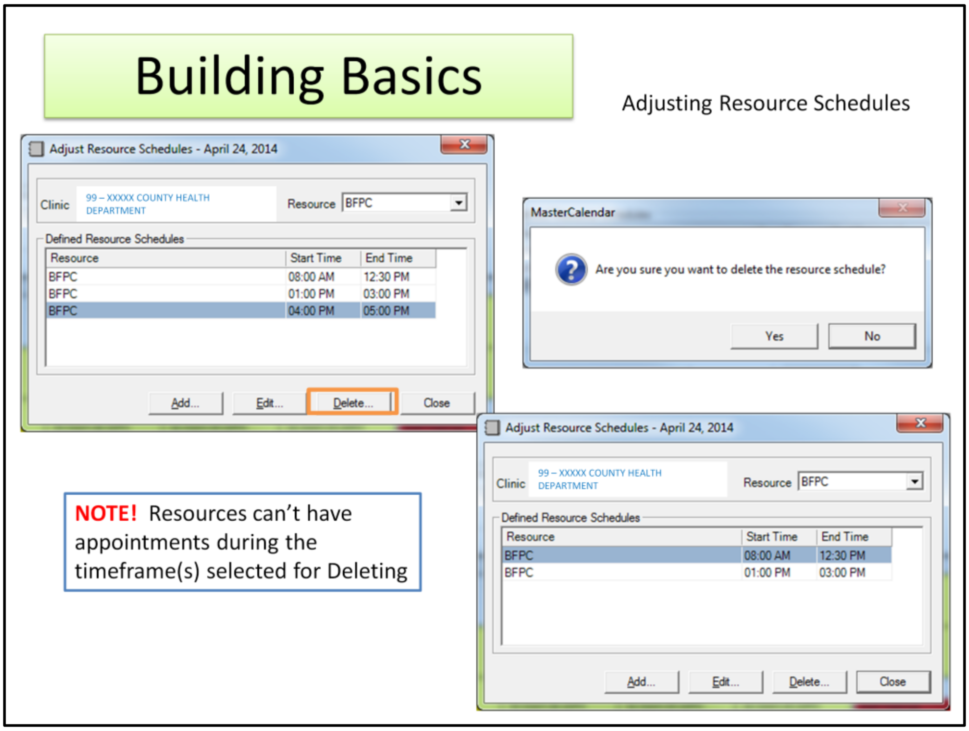
Sometimes it is necessary to adjust the resource schedule if a Resource is no longer available for a specific date or time. You should first check to ensure that the resource has no appointments scheduled for the time frame needing the adjustment. If there are appointments scheduled, again, they must be rescheduled **BEFORE** adjusting the resource.

There are currently **3 different ways to go about Adjusting a Resource's Schedule**. The options are to select the date with defined resource(s) to change and go to the Calendar menu then select Adjust Resource Schedule for Day, Right Click on the date with defined resource(s) to change which will open a menu where you can select Adjust Resource Schedule for Day, or Double-Click on the calendar date that needs its resource(s) adjusted.



The Adjust Resource Schedule screen will open. **Notice** the date you selected is also included in the title. If the Date and the Clinic are correct proceed with the adjustments or changes you intend to make to the scheduler.

Select the resource by clicking on the drop-down arrow.
Selecting Add will allow you to add schedules.
Selecting Edit will allow you to edit current schedules.

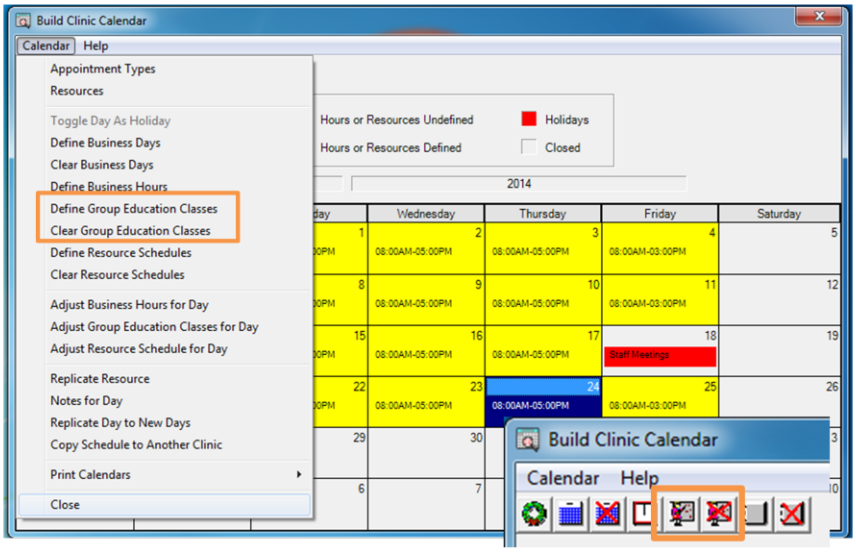


Selecting Delete will bring up a warning or confirmation screen asking “Are you sure you want to delete the Resource Schedule?”. Clicking Yes will remove the resource completely during the selected date and times. Clicking No will return you to the previous screen.

NOTE! Resources can’t have appointments during the timeframe(s) selected for Deleting.

Building Basics

Defining Group Education Classes

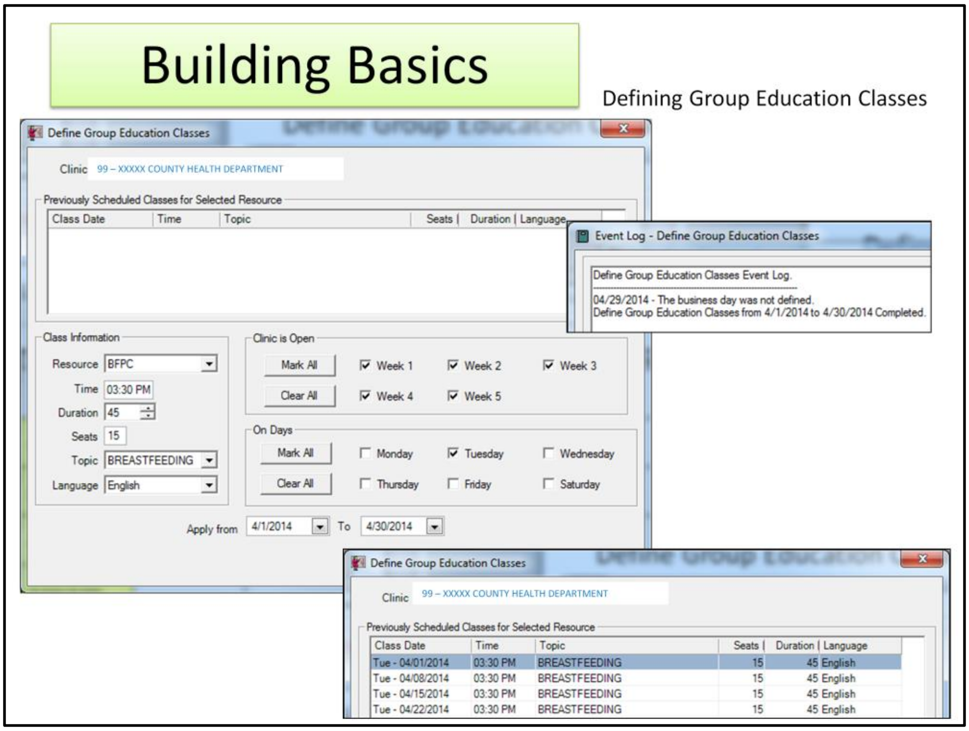


Some clinics have Group Nutrition or BF Education classes. For those clinics that do use Group Classes, the classes can be scheduled in the build calendar portion of the application.

You can place the classes in the schedule by using the Calendar Menu and selecting the Define Group Education Classes or by clicking on the shortcut icon with the instructor at the blackboard. Also, currently there is 1 other option for creating a Group Education Class, but we will review that option a little later.

Be aware that the Resource you would like to use for the Group Ed Class must be a defined resource or have hours dedicated on the schedule. If the resource is not available for the date you intend to have a group education class you may need to add or adjust that resource's schedule.

Also, sometimes Clinics offering Group Education Classes will find that a scheduled class isn't being utilized and decide to Cancel a Group Class.
To do so in MOWINS go to the Calendar Menu and select Clear Group Education Classes or use the icon shortcut button Clear Group Education Classes that looks like an Instructor with a red X. Again, be careful about whether you want to complete this task.

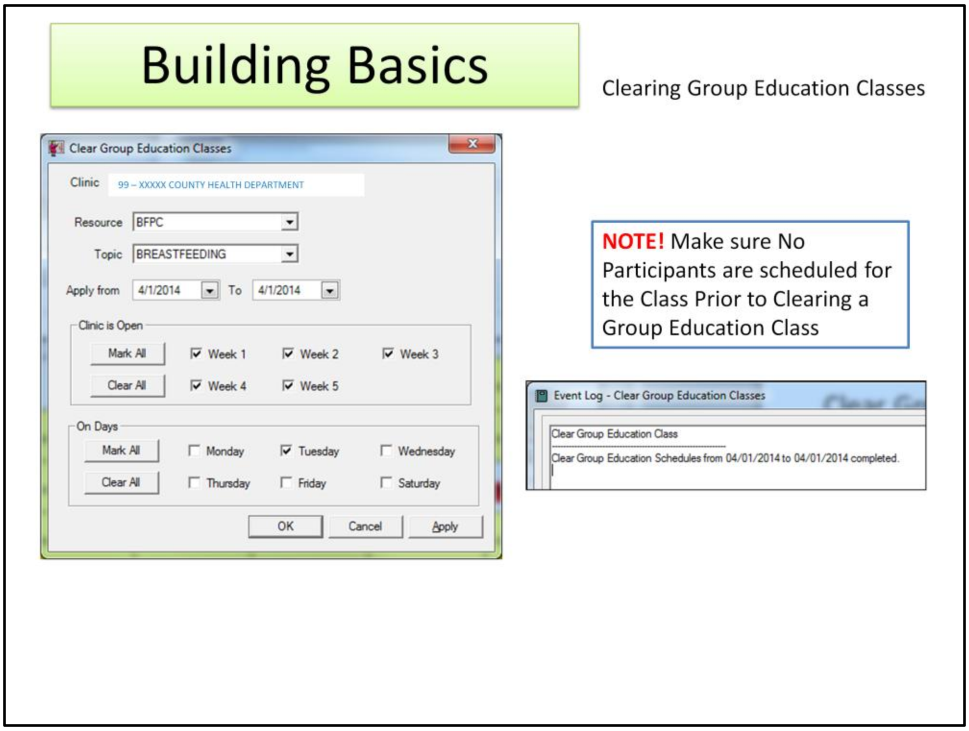


The Define Group Education Classes screen displays for the input of course information. In order to schedule group classes, please check the Clinic and date before proceeding. (When classes for the clinic have been scheduled they will appear in the Previously Scheduled Classes for Selected Resource table depending upon the Resource selected).

To complete the task of scheduling the group education class, you will select the resource that will be teaching the group class, enter the time the class will begin (w/ am/pm), the length of the class in <u>minutes</u>, the number of seats that you have available for the class, the topic from the drop down arrow, the language if it is different than the one highlighted, the weeks the class will occur, the days the class will take place and the from and to dates for the group class. The final step is to click on “ok” if you are finished or “apply” if you have more classes to enter.

Once again, the event log will open to show that the Group Education Classes you have defined for the set timeframe was completed.

If necessary click Close and you will be returned to the Build Clinic Calendar.



When deciding to Clear a Group Education Class make sure NO Participants are scheduled for the Class Prior to Clearing. To clear the class open the Clear Group Education Classes screen.

Select the resource you wish to clear a group class for in the drop down field, select the topic, enter the date range you wish to apply, and mark the clinic week(s) of the month & days of the week to clear. Click on the OK to finish or Apply to clear other group education classes.

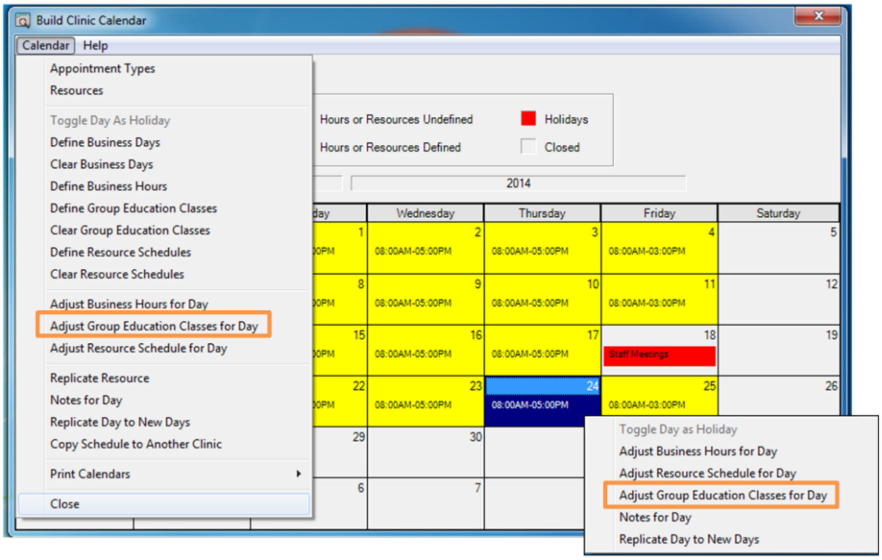
The Event Log will display showing the changes that were completed. You can then return to the Build Clinic Calendar screen.

A quick way to know if you have successfully cleared a Group Education Class is to go back to the Define Group Education Class screen and

review the Previously scheduled grid.

Building Basics

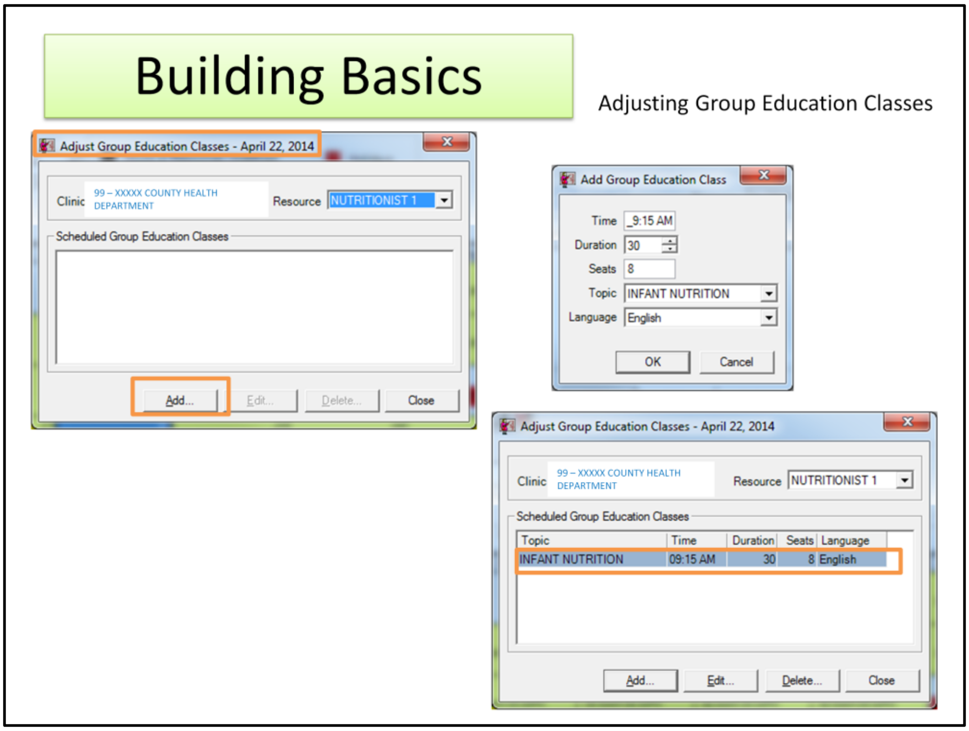
Adjusting Group Education Classes



Sometimes Clinics offering Group Education Classes will find that a scheduled class may need to be later adjusted or edited. For example they may need to change the number of seats available, change the topic of the class, etc.

To do so you must first select the calendar date that you would like to adjust or change Group Class information. Then using the Calendar Menu and selecting the Adjust Group Education Classes for Day or by Right Clicking on the date to change you can open a menu where you can select Adjust Group Education Classes for Day.

Note! You can make adjustments to a scheduled Group Education Class even if participants are scheduled for the class.



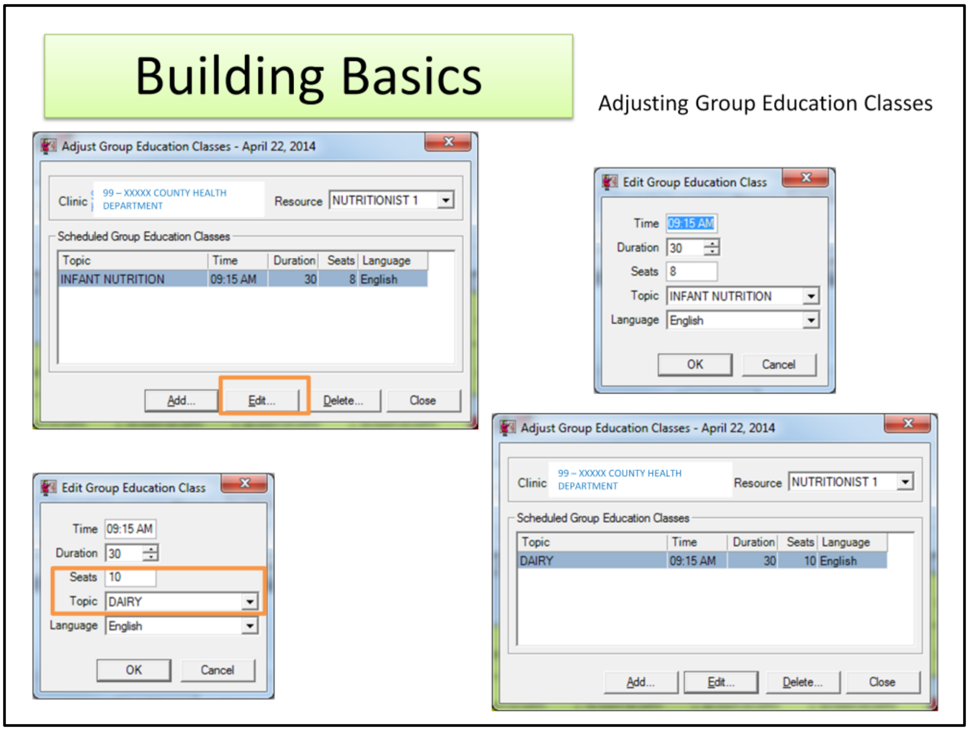
Once the Adjust Group Education Classes screen opens you will again notice the date you selected is also included in the title. If the Date and the Clinic are correct proceed with the adjustments or changes you intend to make to the schedule/class.

If necessary, select the resource by clicking on the down arrow. If the selected Resource has not been designated to teach a group class (on the date selected) the Scheduled Group Education Classes field will appear blank and only the Add & Close buttons will be available.

Selecting **Add** will allow you to add classes for the date and resource selected. This is also an alternative option (mentioned earlier when we reviewed Defining Group Education Classes) for creating a Group Education Class. **Note!** The date you selected when you chose to Adjust Group Education Classes does not have to actually be a date that had ANY classes scheduled.

Once there is a Defined Class selected in the Adjusted Group Education Classes screen the Edit & Delete buttons will also be active and can be selected.

Remember! To add a class the Resource selected must have defined hours for the date/time you are attempting to create the class.

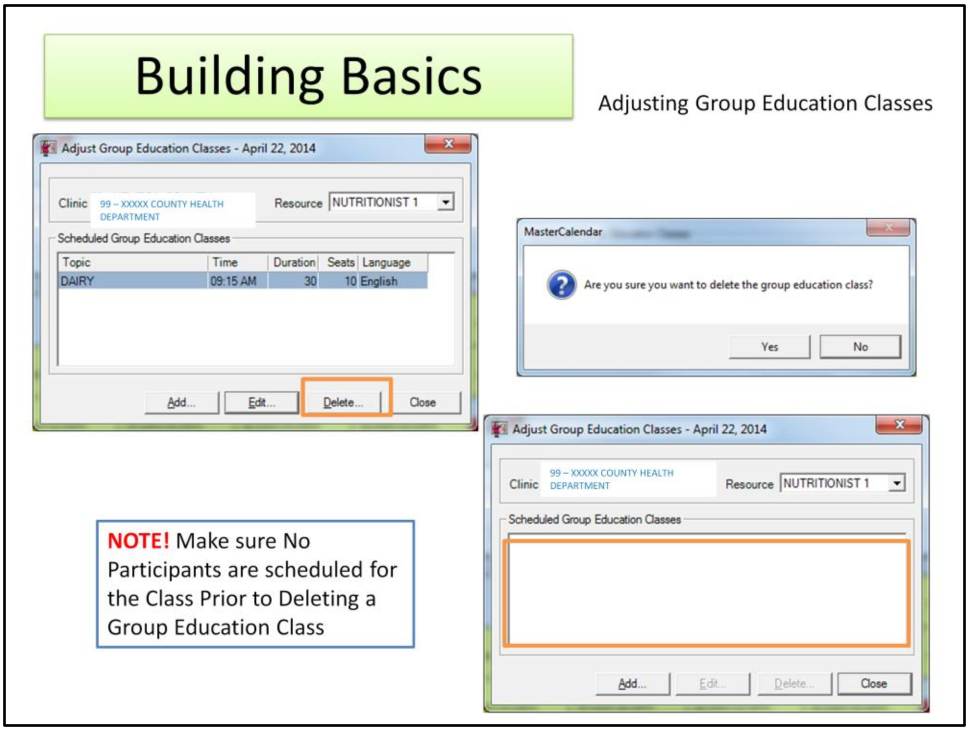


Selecting Edit will allow you to edit currently scheduled classes. Edits can be done even with clients scheduled for the class.

You can also change time but we caution you to Only utilize this edit option if there are no participant scheduled for the class.

You can even change time & duration (with participants scheduled)however we caution you to first check to make sure the resource “leading” the class is not already scheduled for other appointments or out of the office (has no defined hours for the time/duration you are changing the class) and that participants scheduled for the class are not scheduled for other appointments in your clinic at the time you are trying to set the class for through the edit.

Really the best use of the Edit option is to change the number of seats available for the class and possibly to change the topic.



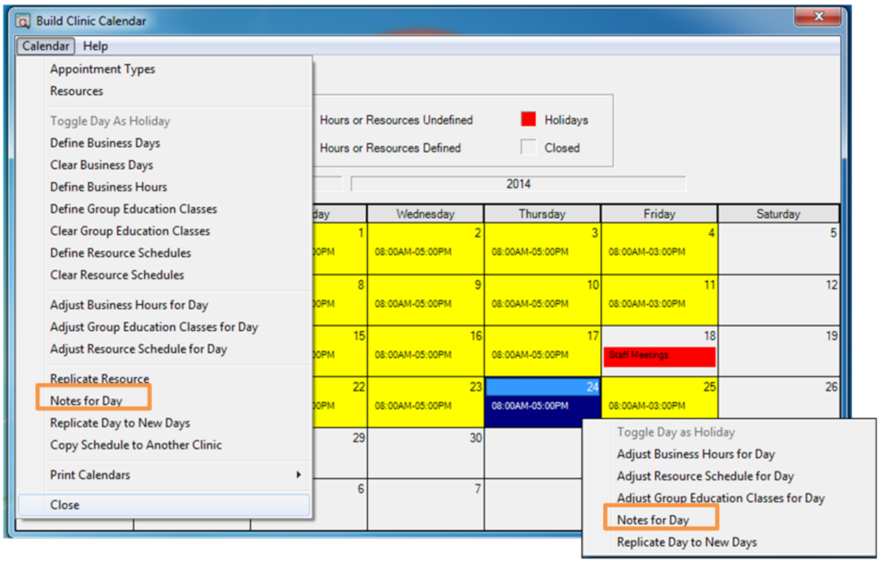
If you are using the **Delete** option be sure this is the action you intend to take.

Selecting Delete will bring up a warning or confirmation screen asking “Are you sure you want to delete this Resource Schedule?”. Clicking Yes will remove the resource completely during the allotted dates and times (as shown). Clicking No will return you to the previous screen.

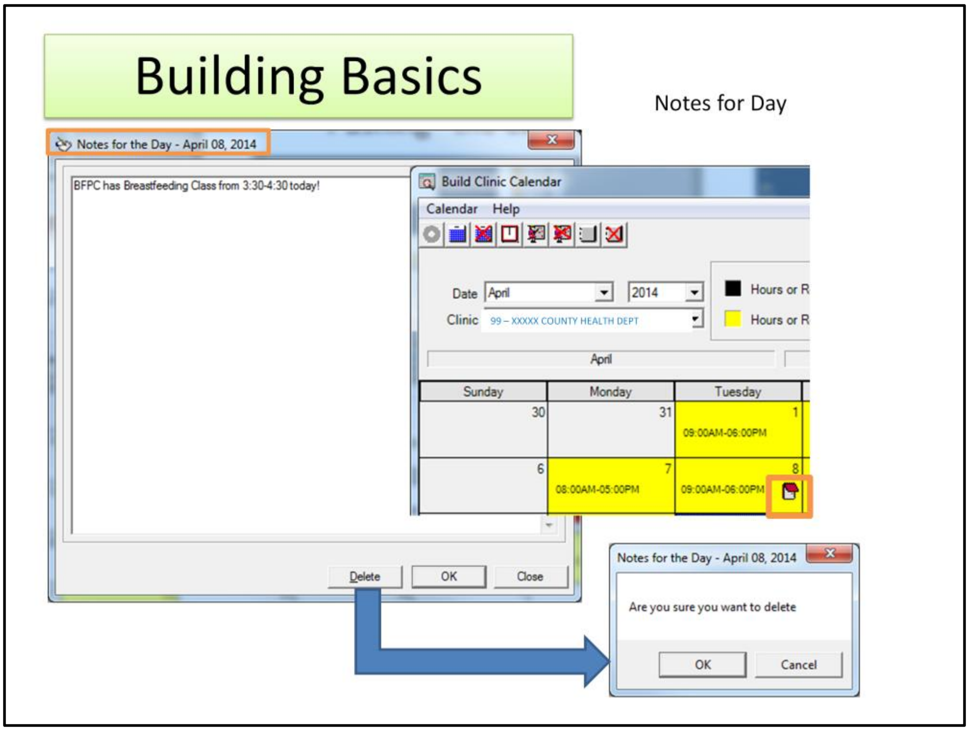
NOTE! Make sure No Participants are scheduled for the Class Prior to Deleting a Group Education Class.

Building Basics

Notes for Day



Another great option when building the Clinic Calendar is the **Notes for Day** option. It can be accessed via the Calendar menu or by righ-clicking on the date you want to add a note on and then selecting Notes for Day from the menu that displays.



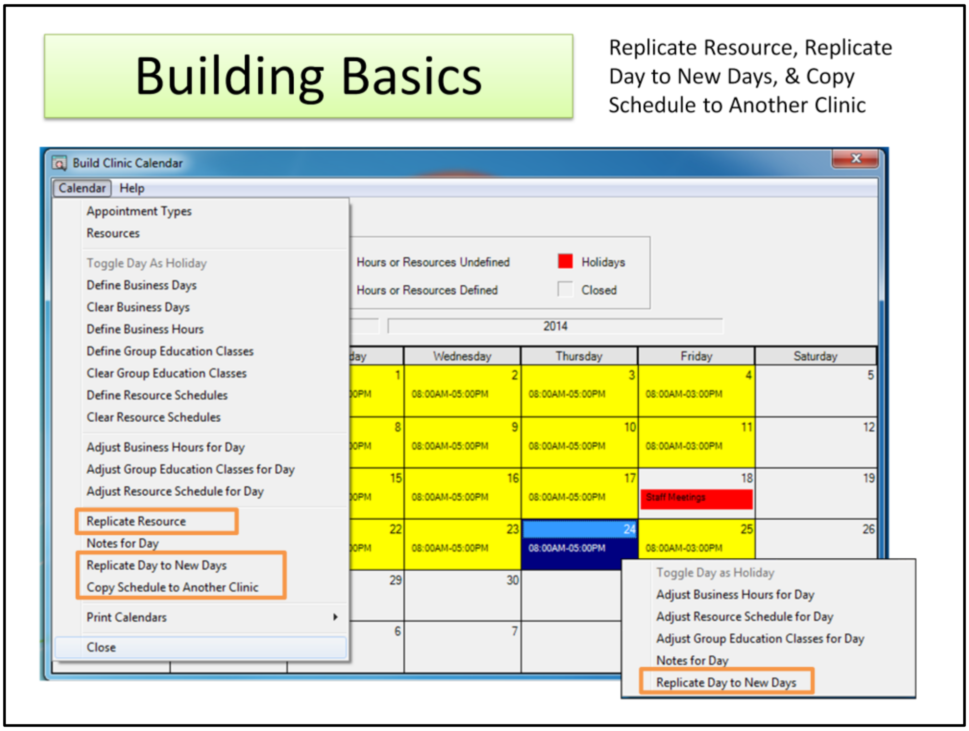
When the Notes for the Day screen opens you'll notice the date you selected is also included in the title. If the Date and the Clinic are correct proceed with the addition of your note for the day.

Once the Note is written click OK. You will then be returned to the Build Clinic Calendar where you will notice that a **Notepad icon** has been added to the date you selected to add a Note for Day.

Notes can also easily be deleted. Select the date that contains the Note or that has a Notepad and again access the Notes for the Day screen. When it opens select Delete. Once you've selected Delete a confirmation screen appears asking "Are you sure you want to delete". You can then select OK to remove the Note or Cancel to allow the note to remain.

Notes for the Day can be a useful tool to remind you and other staff of many things from planned events to resource availability.

Notes for Day can be viewed in the Clinic. This will be shown a little later on.



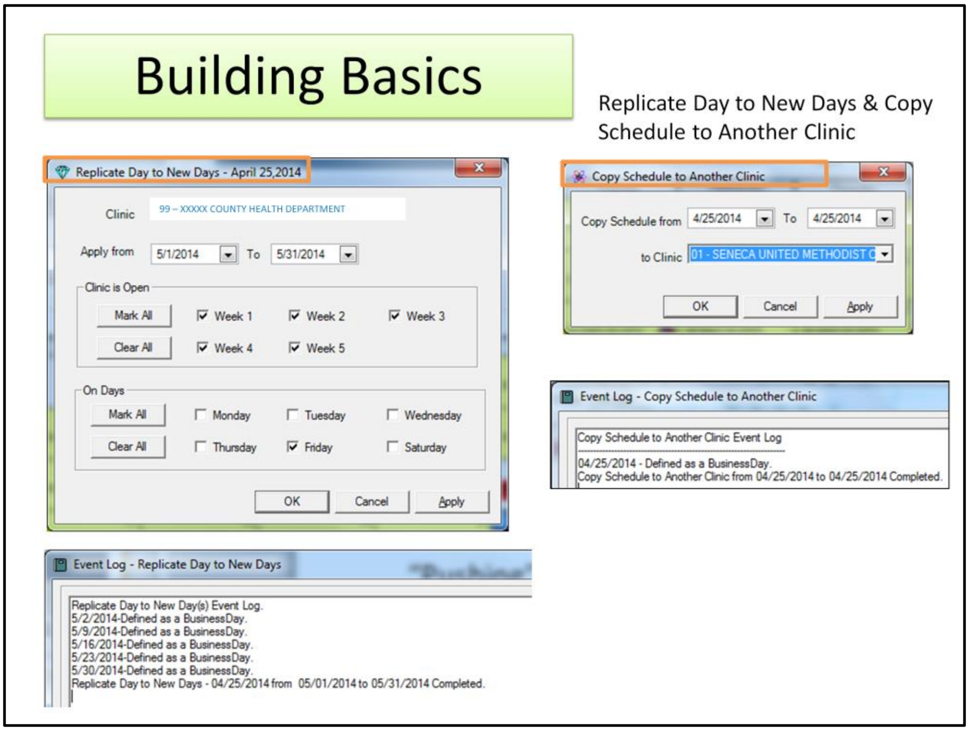
Next options open the door for mistakes and aren't the most user friendly.

If you have more than one clinic with the same schedule you may wish to copy a schedule from one clinic to another using the Copy Schedule to Another Clinic. First off, open the clinic that you want to copy FROM. There is no shortcut icon for this task, but there is a **menu** option through the Calendar **Menu**.

Enter the copy schedule from beginning date. Enter the copy schedule from ending date. **Choose** the clinic that you want to copy to from the drop down field. (You can only choose a clinic that is within your agency. Basically you can only copy from a main site to a satellite site or vice versa).

The Replicate Day to New Days is similar.

However, both the Copy and Replicate Day options really only copy business day/hour information and not necessarily the Resources.

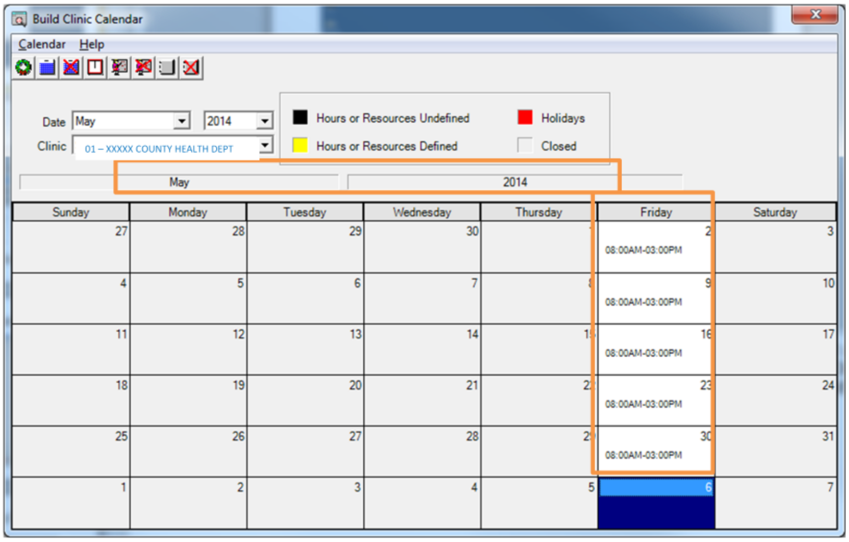


Again we have the options in the CAS to Copy Schedule or Replicate a Day but both options are not necessarily user friendly and open the door for mistakes in the clinic schedule but here's a quick peek at what these screens look like. Once information is selected Event Logs will display.

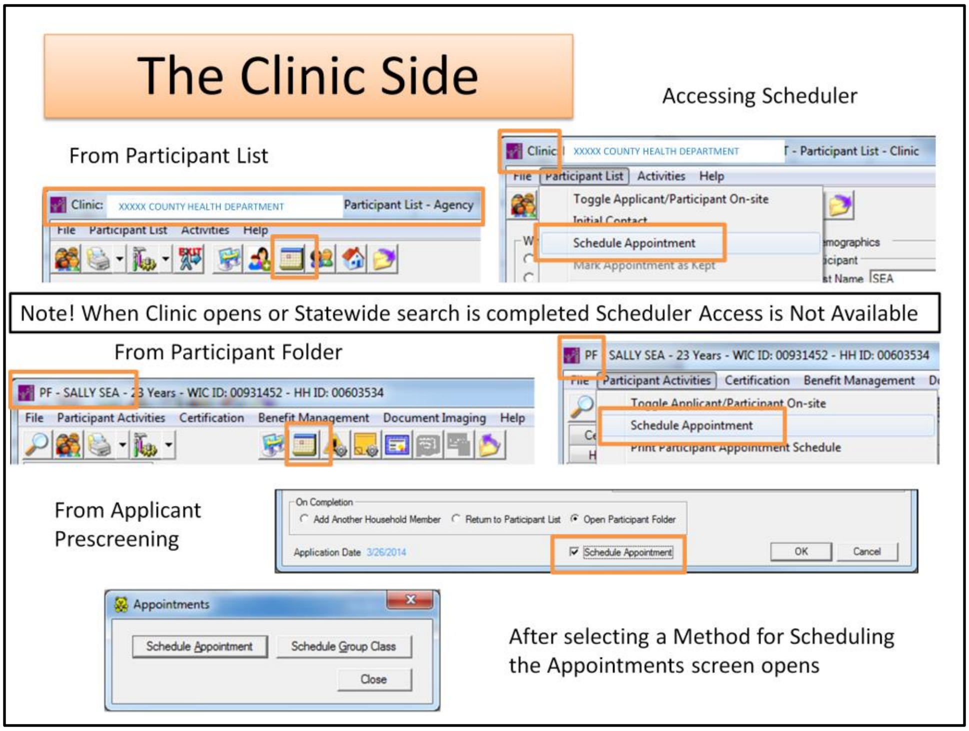
You can then view the schedule information in the Build Clinic Calendar screen but be aware that both options will NOT Define Resources.

Building Basics

Replicate Day to New Days



You can then view the schedule information in the Build Clinic Calendar screen but be aware that both options will NOT Define Resources.

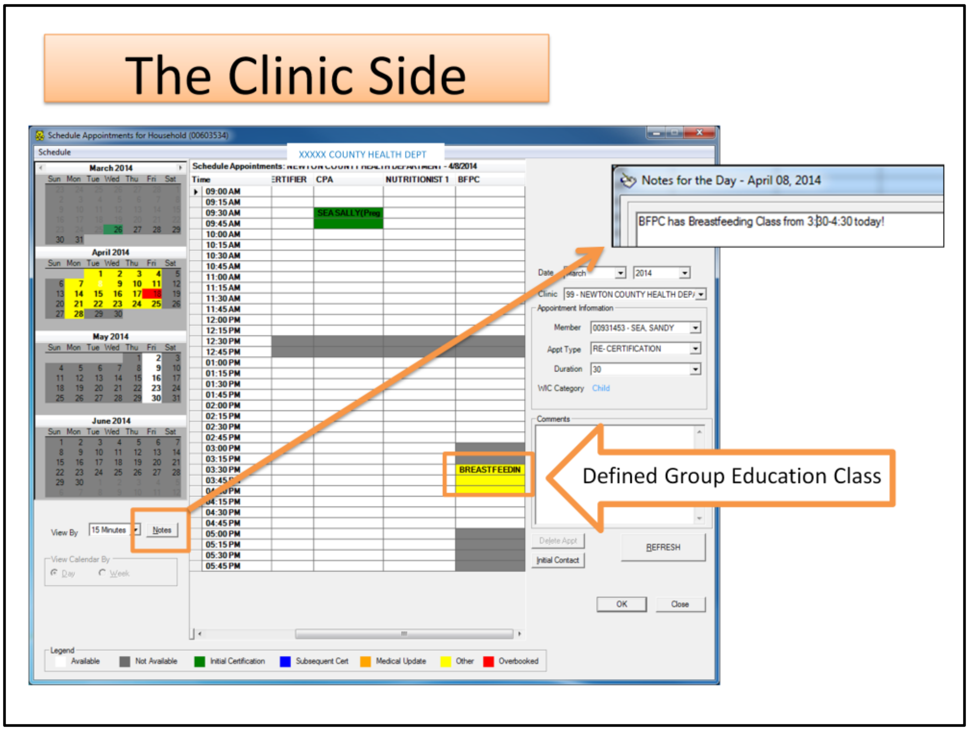


Now, so we can show you a the Notes for Day information and also one item regarding Group Education Classes we have closed out of the CAS and have entered the MOWINS Clinic.

There are several ways of accessing the Clinic's Scheduler. It can be accessed through the Participant List screen via the shortcut icon or the Participant List menu. However, be aware that when the clinic opens or when a Statewide search has been completed the Scheduler is not available. To activate these options for accessing the Scheduler you must complete a localized search via Agency, Clinic, On Site, or Appointments for Today search options.

It can be accessed similarly through the participant folder using again the shortcut icon or the Participant Activities menu. One other option for accessing the scheduler is via the Applicant Prescreening window for participants created new in MOWINS.

Once you have selected the option for accessing the scheduler the Appointments screen appears where you will select the Schedule Appointments (or Schedule Group Class).



Once the Schedule Appointment option has been selected the Clinic's Schedule Appointments for Household screen opens.

We can then select a date from the calendars shown on the left. If we select a date that has had a Notes for Day created we can then view that Note by selecting the Notes button on the lower left next to the View By drop-down menu. If there were not an Note for Day created then the Notes button on this screen would be ghosted and could not be selected.

Also on this date we selected to create a Breastfeeding class with the Resource BFPC in the CAS. When we look at this schedule screen we can see that the Resource's schedule has been blocked with the class information so that NO individual appointments can be scheduled with this Resource at this same time.